eRecruitment

Recruiter User Manual

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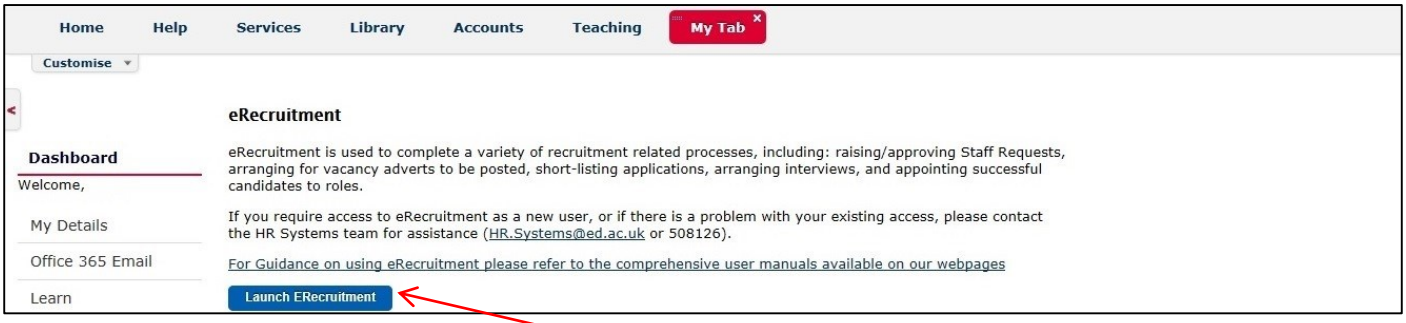
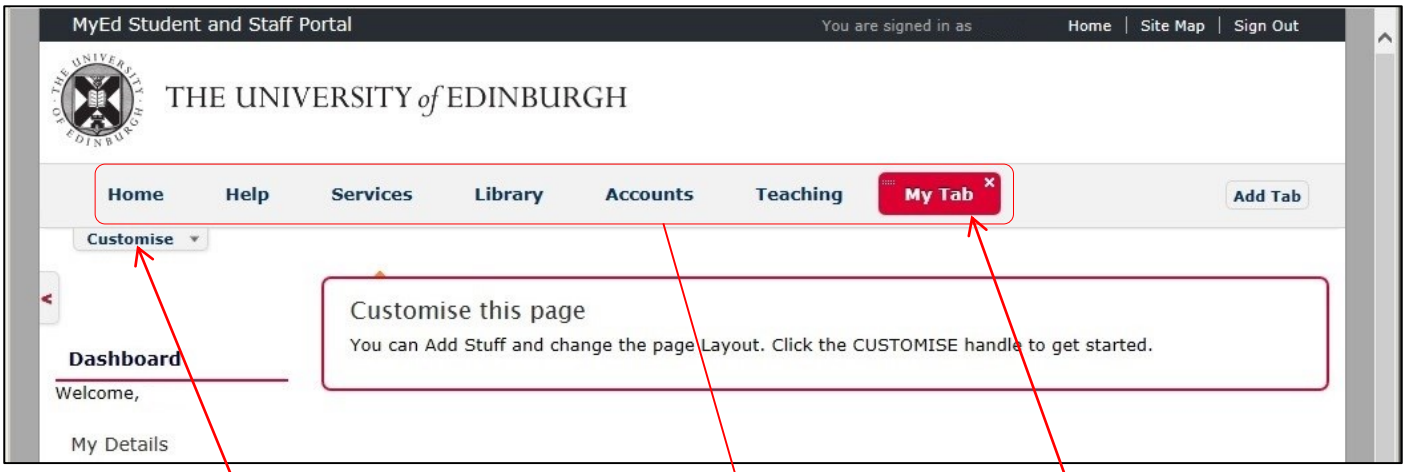
How to access the eRecruitment system

Log in to MyEd www.myed.ed.ac.uk and open the eRecruitment channel.



Click on the **Launch eRecruitment** button.

If you are unable to locate eRecruitment in myED, you can add the eRecruitment channel.

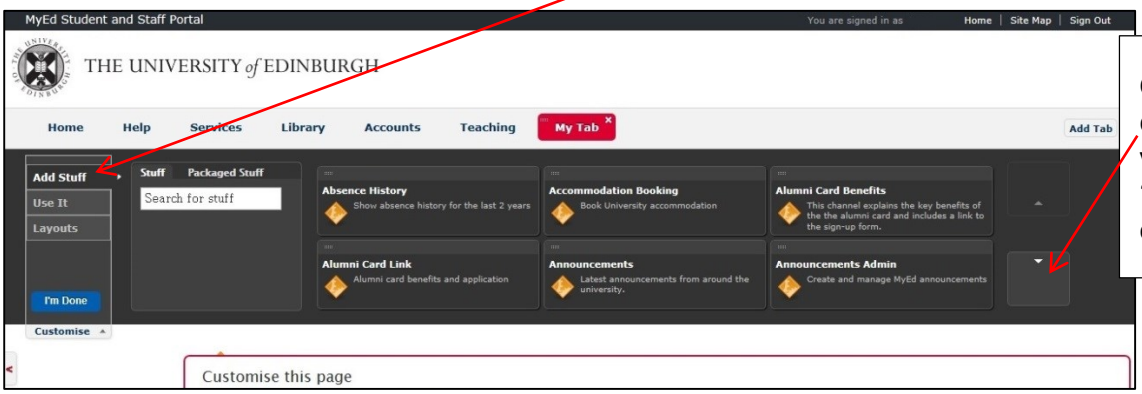


1. Click on a Tab

2. "**My Tab**" has been clicked on. (NB: To indicate it has been clicked on, the tab background colour is red.)

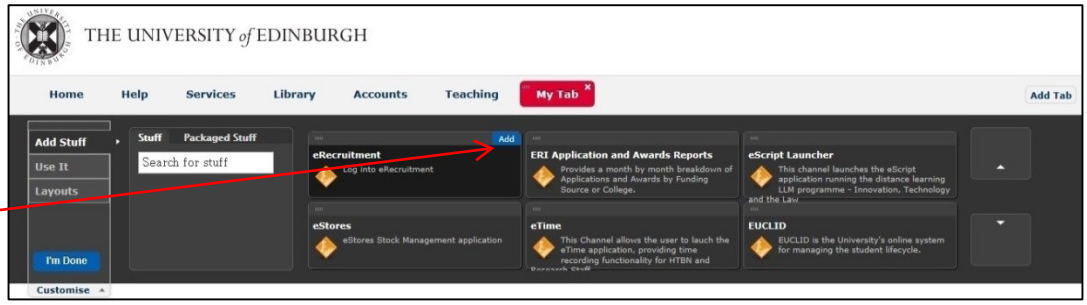
3. Click on **Customise**

A drop down panel will open, which will allow you to "**Add Stuff**"

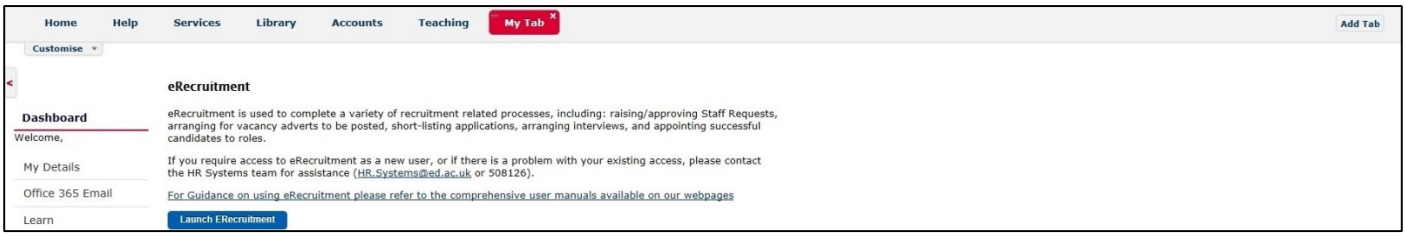


Click the Scroll down arrow until you find the "**eRecruitment**" channel.

Hover your mouse over the "**eRecruitment**" channel and then click on **Add**



This will add the "**eRecruitment**" channel into your "My Tab" space.

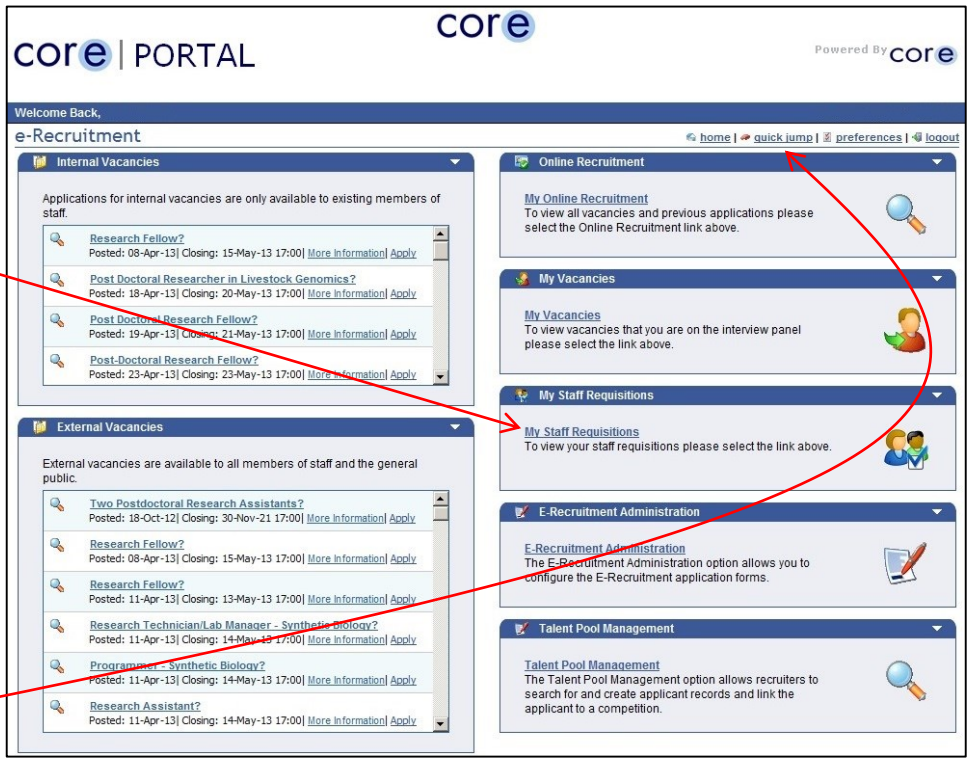


This is available in video tutorial, called "Customising your layout" and can be viewed at:
http://www.ed.ac.uk/schools-departments/information-services/computing/comms-and-collab/myed-portal/using-myed

When you click on the **Launch ERecruitment** button in MyEd, you will be directed to this screen:

We refer to this screen as the Portal, where we initiate the process by way of a **Staff Requisition**.

For Recruiters, the majority of the work is completed in the **Back Office**.



To access the Back Office, you need to click on the **Quick Jump** link.

Click on Quick Jump

Then Core HR

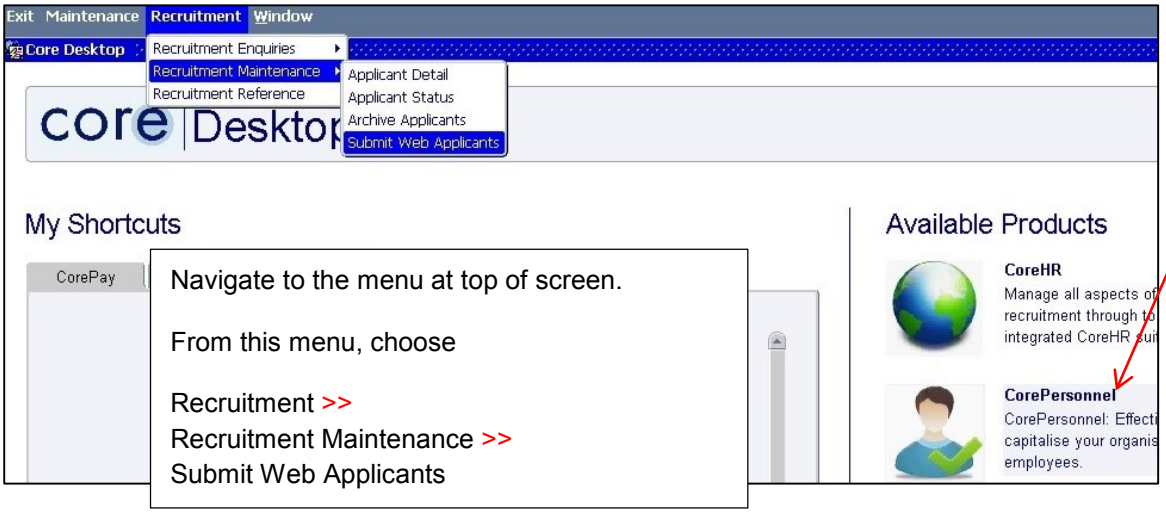
How to accept applications into the Back office - submit an application

In order to access applications for your vacancy and to enable the interview/ shortlisting panel to view applications, you will need to **submit web applicants.** This will move applications into the Back Office.

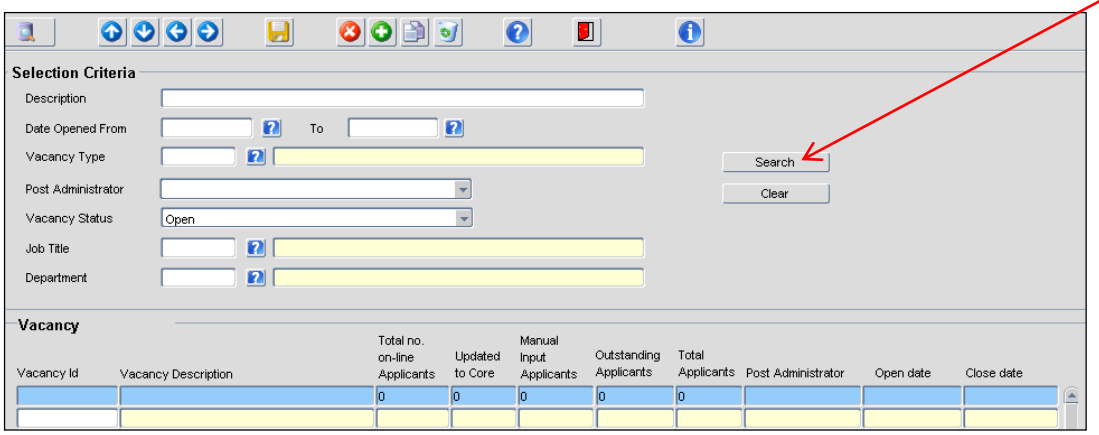
You can do this gradually as applications are received. Alternatively, you can submit all web applicants in one action, after the closing date. Whichever way you choose to do this, you must ensure that once the closing date is reached, all web applicants for the vacancy have been submitted.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

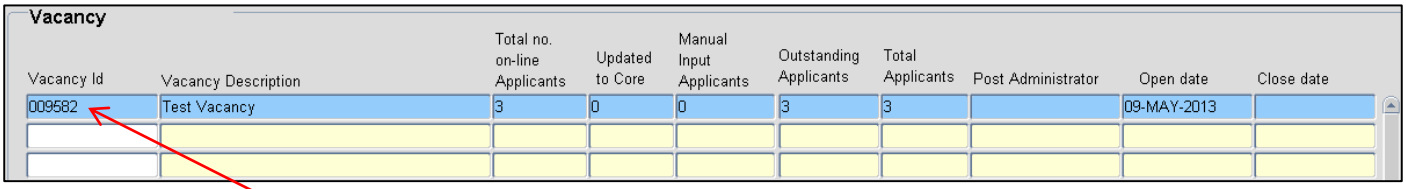
From within the eRecruitment back office, click on Core Personnel



You can view all the applications within your area of responsibility. To do this, click on the **Search** button.

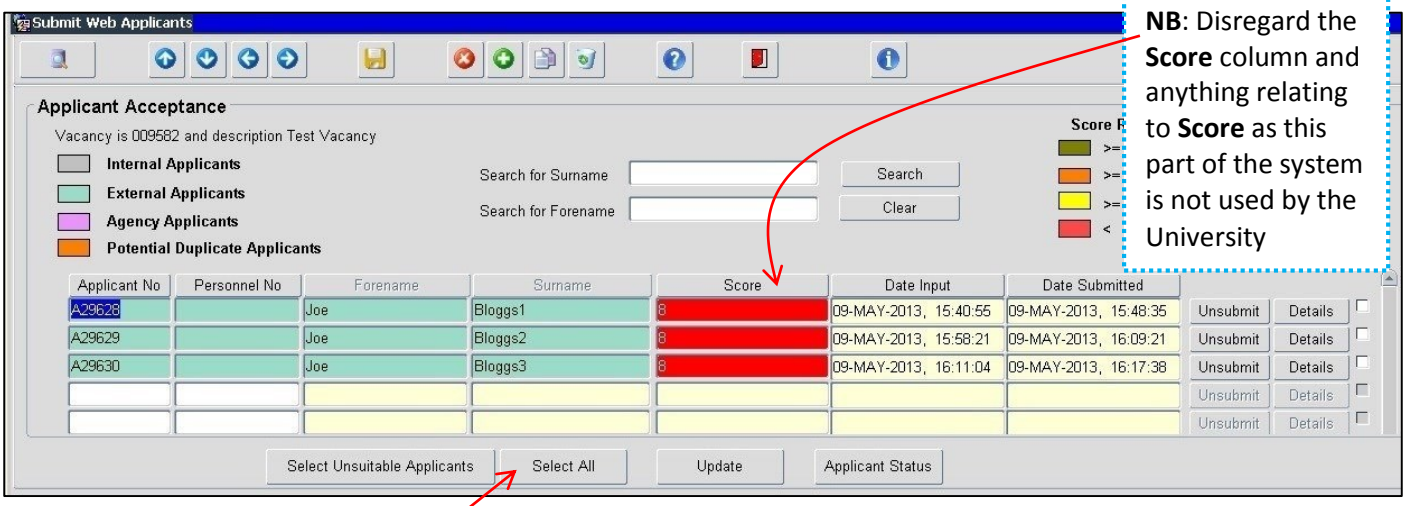


Vacancies will display in Vacancy Reference number (Vacancy ID) order, with the highest Vacancy Reference number (most recently created vacancy) at the end of the list. Use the scroll bar on right of page to move up and down list.



Double Click on **Vacancy Number** you are working on.

You will then see the **Applicant Acceptance** screen, with a list of applicants who have applied for the vacancy.

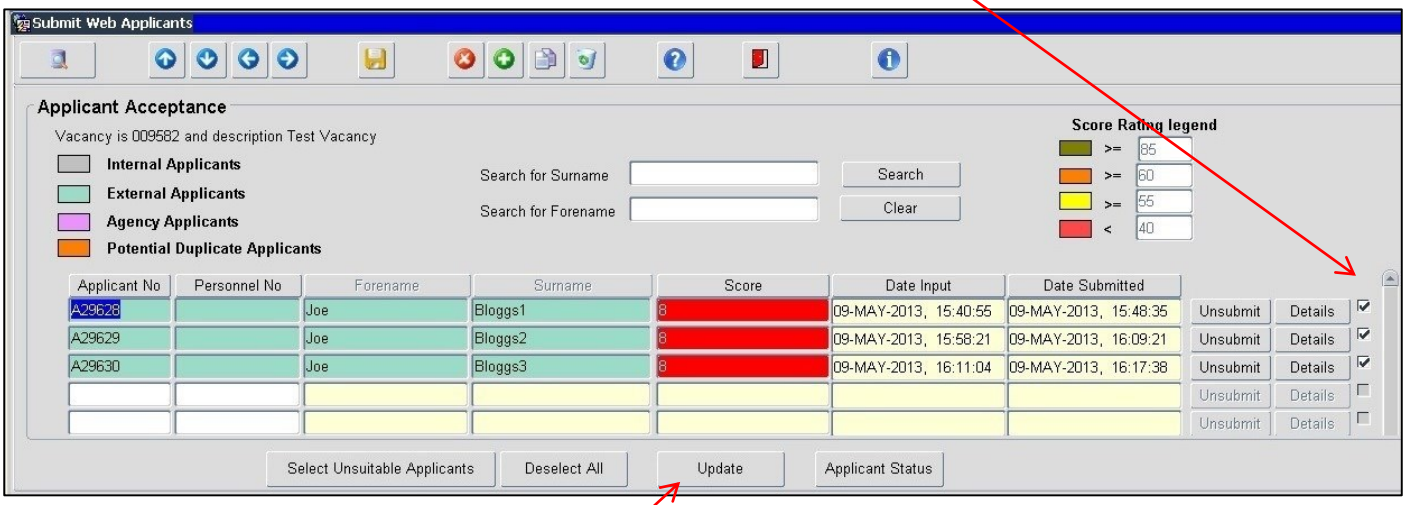


NB: Disregard the **Score** column and anything relating to **Score** as this part of the system is not used by the University

Within this screen you can submit all, or the majority of the candidate applications.

To do this, Click on the **Select All** button at the bottom of the screen.

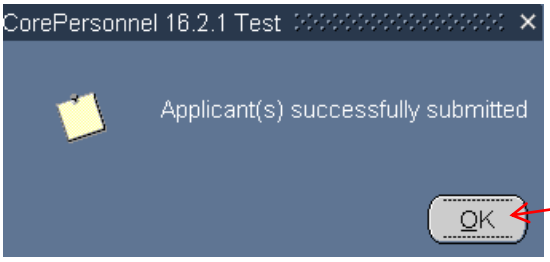
A tick will appear in the check-box to the right of each applicant's details to show that they have been selected (you can un-tick the check-box for any application that you do not wish to submit).



Click on the **Update** button at the bottom of the screen

The Applicant Status box will appear.

Click on the **Update** button.

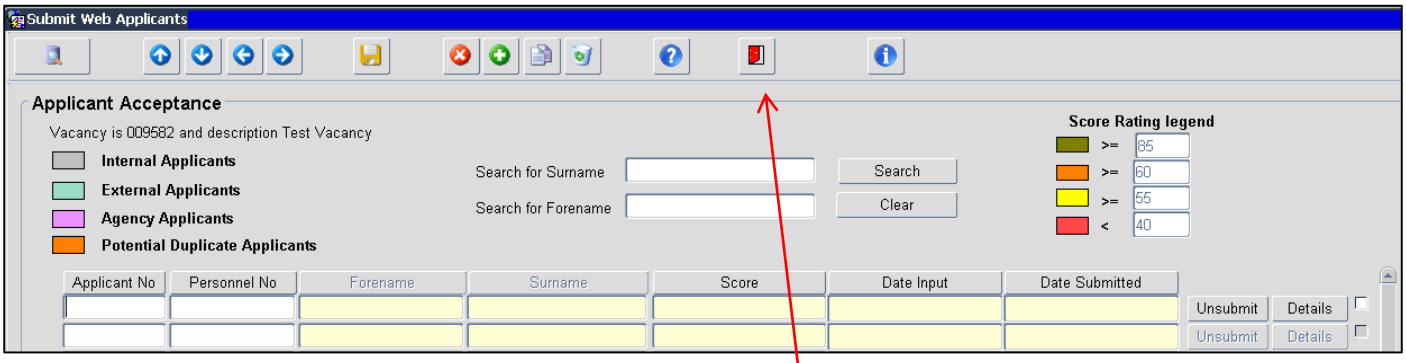


A confirmation message will appear

Click on the **OK** button.

You are then taken back to the **Applicant Acceptance** screen. You will notice that your applicants are not visible, as they have been submitted into the back office.

At this point, candidates who want to amend their application will not be able to do so via the system. Candidates can only amend an application if their application has **not** been submitted to the back office.



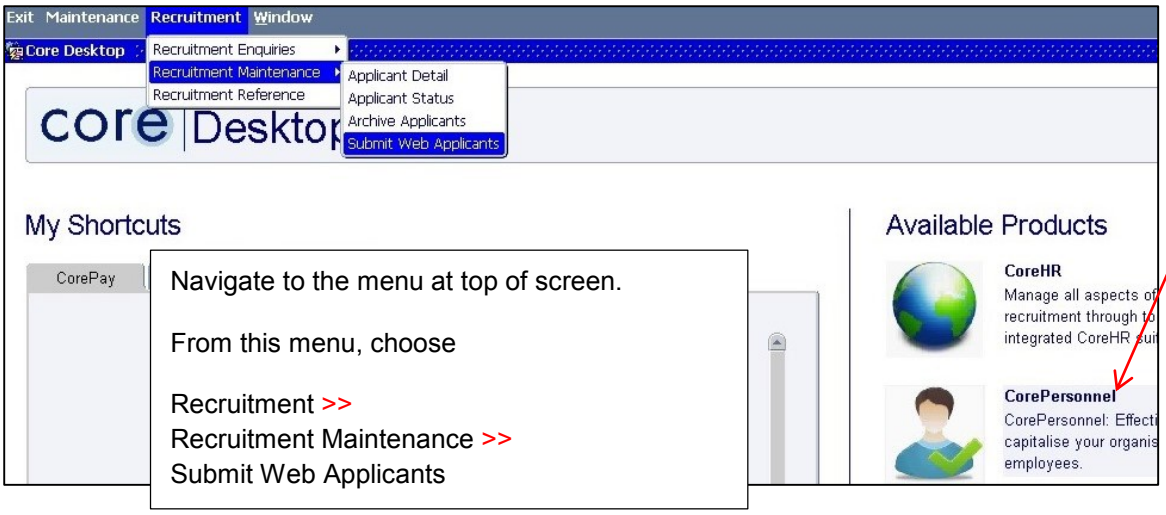
To leave this screen and return to the previous menu, click on the red door icon.

How to Un-submit an application

To Un-submit an application you need to be in the **submit web applicants** screen.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel

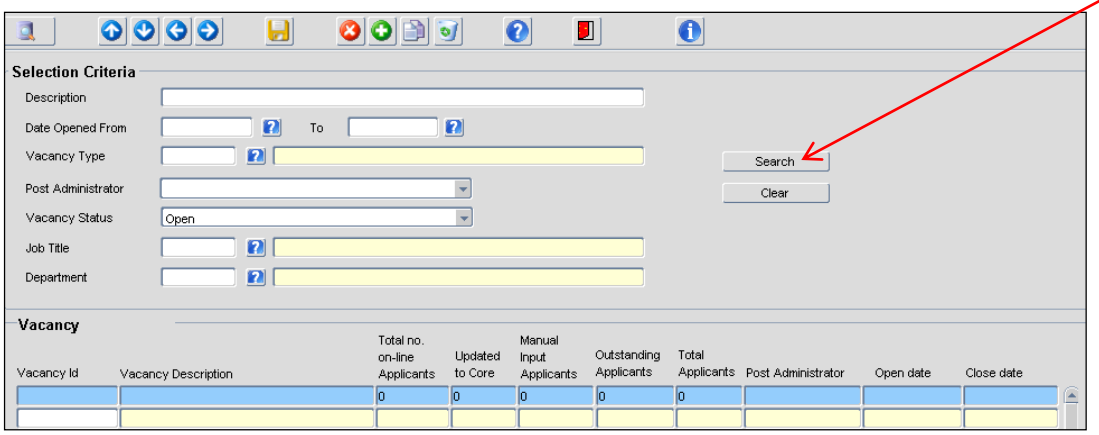


Navigate to the menu at top of screen.

From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Submit Web Applicants

You can view all the applications within your area of responsibility. To do this, click on the **Search** button.



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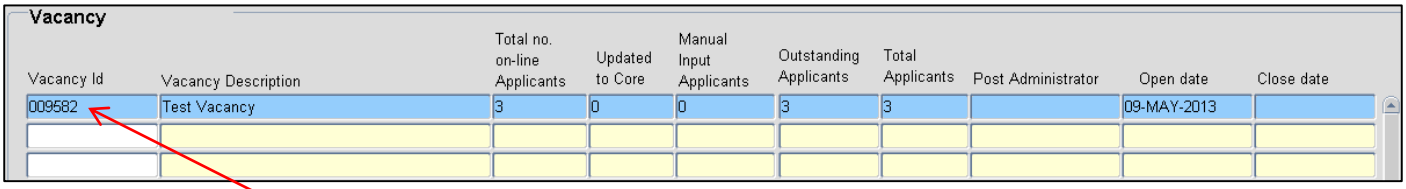
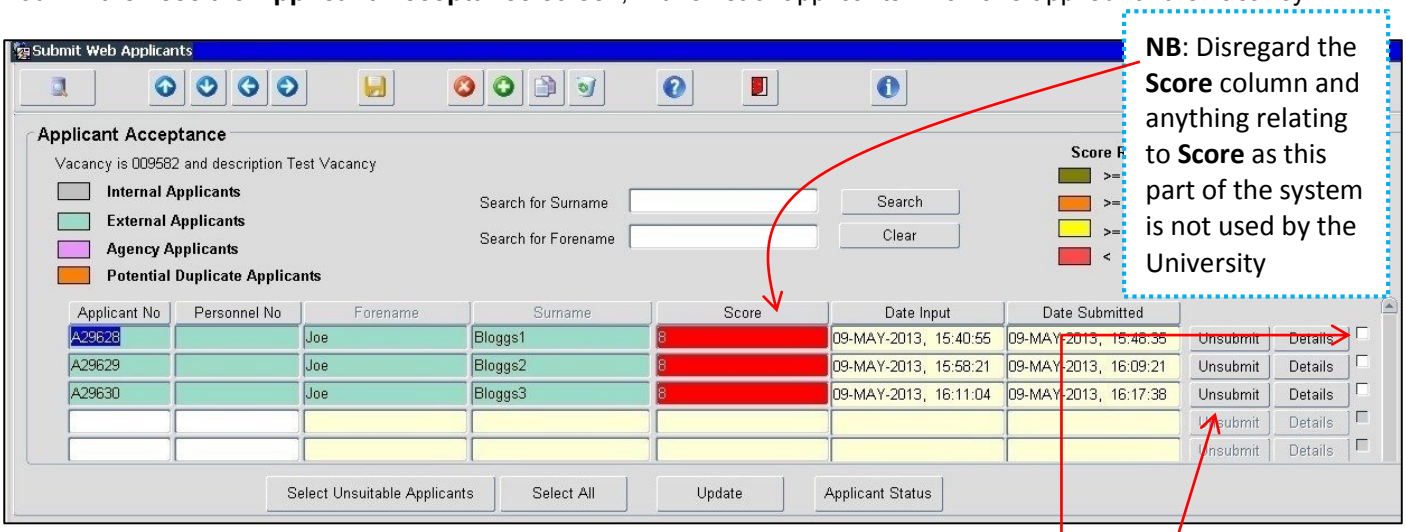


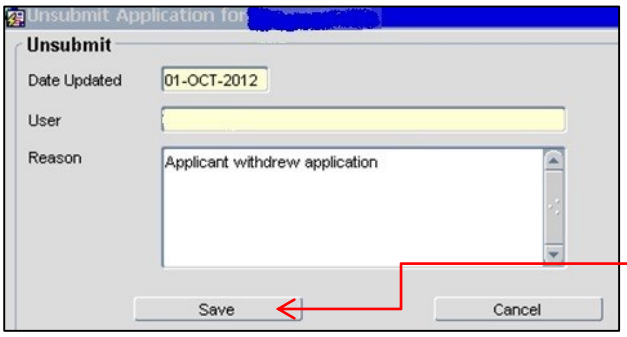
Double Click on **Vacancy Number** you are working on.
You will then see the **Applicant Acceptance** screen, with a list of applicants who have applied for the vacancy.



NB: Disregard the **Score** column and anything relating to **Score** as this part of the system is not used by the University

Click in the check-box to the right of the application that you wish to un-submit.
A tick will appear to confirm that the application has been selected.

Click on the **Unsubmit** button to the right of the application you wish to un-submit.



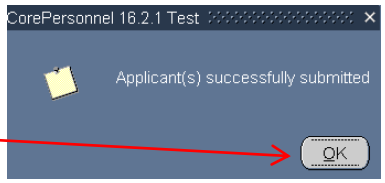
You will then see an **Unsubmit** box.

Click into the **Reason** field and type the reason for un-submitting the application.

Click on the **Save** button

A confirmation message will appear

Click on the **OK** button.



This action will return the candidates application back into their application history within the Jobs website and they can then edit / make changes, before submitting again.

How to delete an application

If you have not performed a Submit Web Applicant action, you would be able to un-submit the application. However, if the application has been submitted the application cannot be edited or added to within eRecruitment.

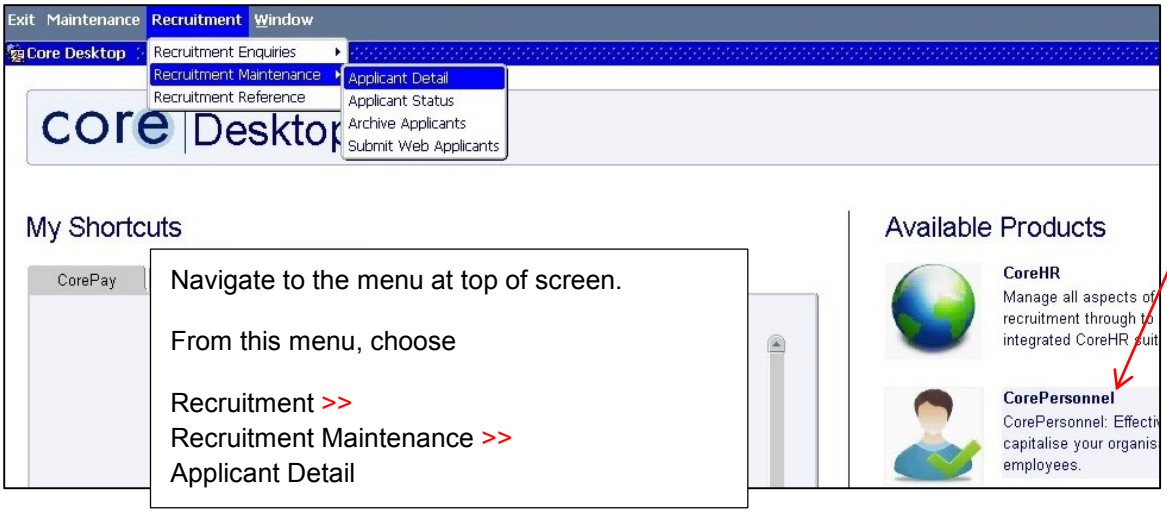
The applicant may request that another application be submitted. In this instance, the application would need to be deleted from the system.

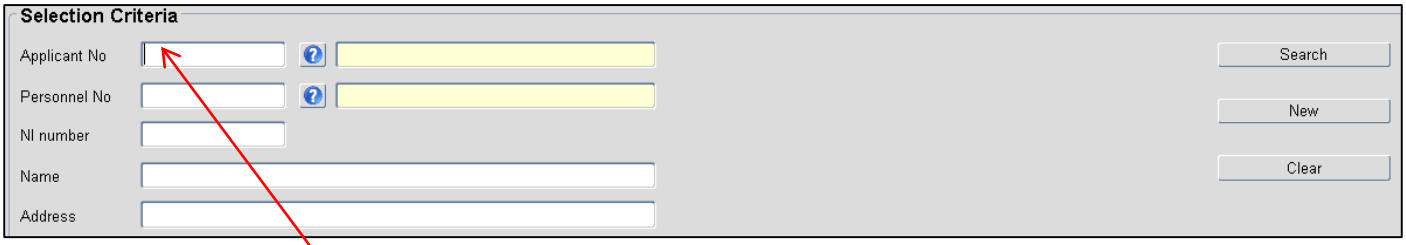
NB: the applicant must be made aware all of their application content will be deleted, meaning they will need to do the whole application again in its entirety.

In summary, you need to bring up the applicants details on screen, click into their application history and then delete the application in question. You are **not** able to bring the vacancy up on the screen and delete the application.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel

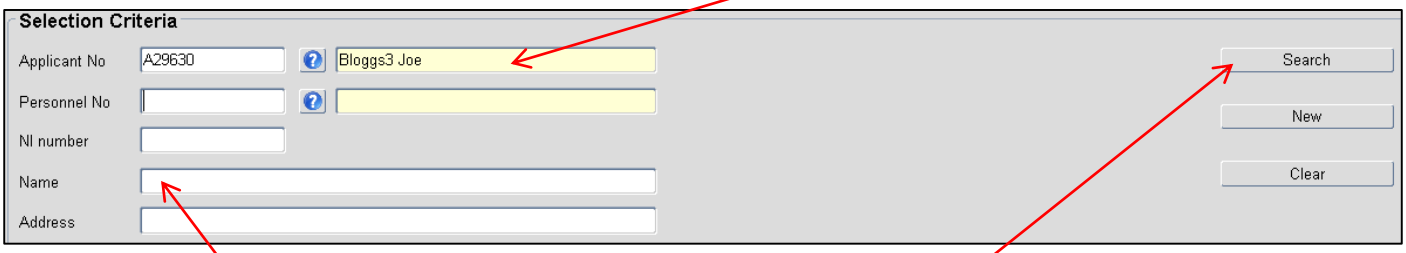




If you know the applicant number, you can type this in the **Applicant No**. field.

You must press the Tab key on your keyboard to activate a search on the applicant number.

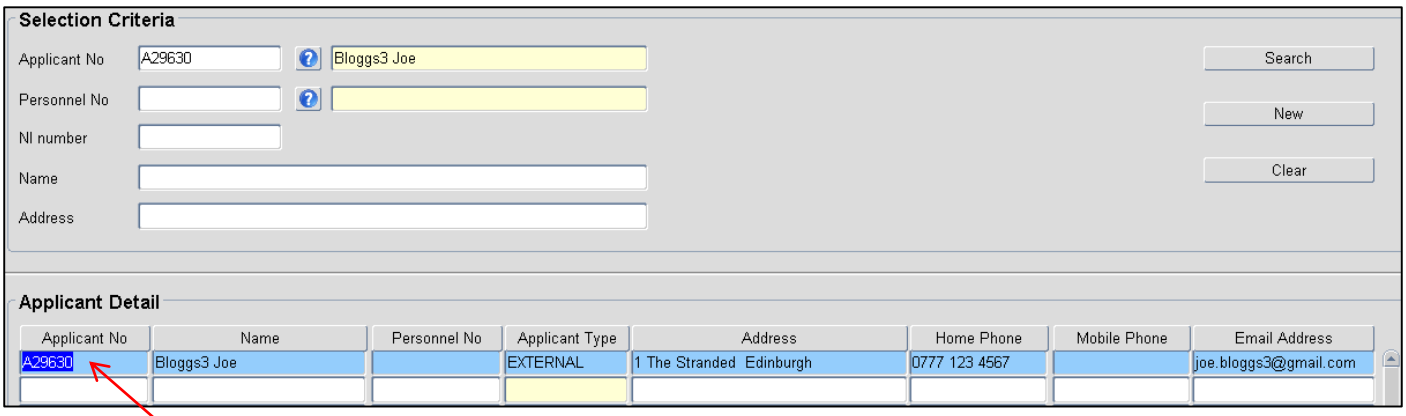
After you press the Tab key, the applicant name will populate in the yellow field next to the **Applicant No**



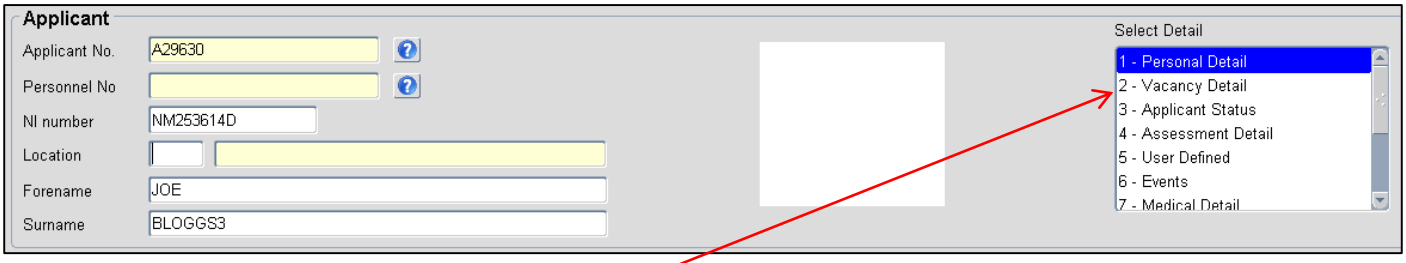
If you are not sure of the applicant number, you can enter all or part of the applicant name in the **Name** field.

You now need to click on the **Search** button, which will bring up the applicant details.

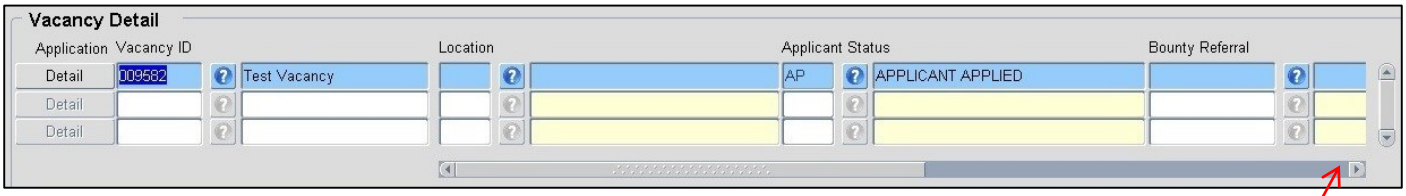
NB: If you are attempting to delete an application and cannot locate the application via the search, it is possible the application hasn't been submitted into the back office.



Double click on the **Applicant** number in the Applicant Detail section.

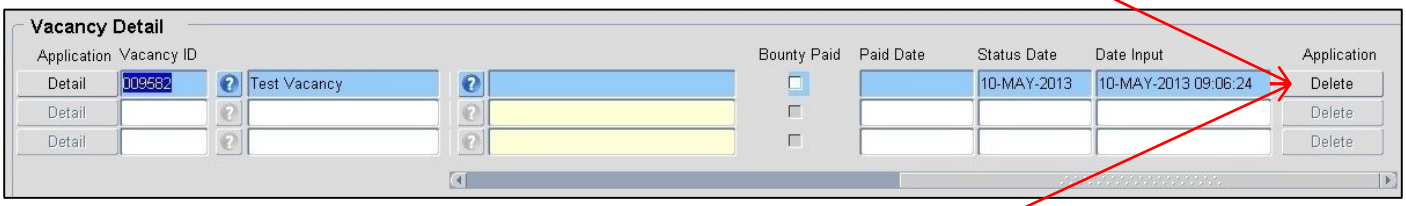


Within **Applicant** section, click on **Vacancy Detail**, which is located on the right of your screen in the **Select Detail** list



The Vacancy Detail screen will list all the vacancies which have been made by an applicant and have been submitted to back office.

The Vacancy Detail screen has a lot of columns, so you will need to scroll horizontally to the right until you see a **Delete** button.

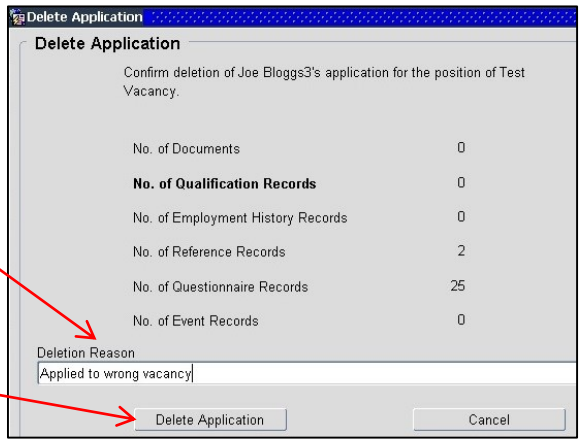


Once you have confirmed the correct application number, click on the **Delete** button.

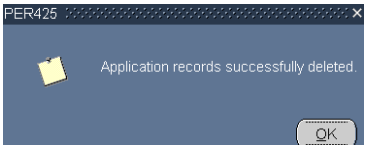
The **Delete Application** box will appear.

Type into the **Deletion Reason** field with an explanation

Then click on the **Delete Application** button.



A confirmation message will appear.
Click on the OK button



How to link an applicant to a vacancy that has not been advertised

This guide will show you how to:

a. Check if an applicant has an existing record

IF NOT

b. How to create a new record (if you are sure a record does not already exist)

AND

c. How to link a new or existing applicant's record to a vacancy

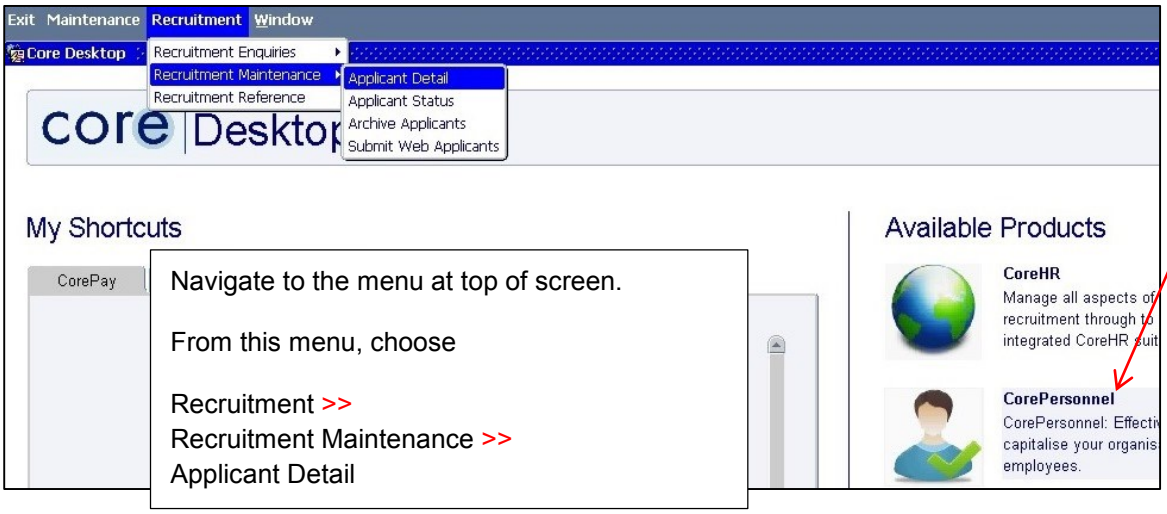
The vacancy may not be advertised, (ie. it will not be visible in the vacancies listing on the UOE Jobs website http://www.vacancies.ed.ac.uk) or it may have been advertised but none of those who applied to the post are being appointed to it. For example an applicant has been put forward out-with the eRecruitment system, such as a Guaranteed Hours contract or someone named on a grant. In either case, the process of linking an applicant to a vacancy is the same.

a. Check if an applicant has an existing record

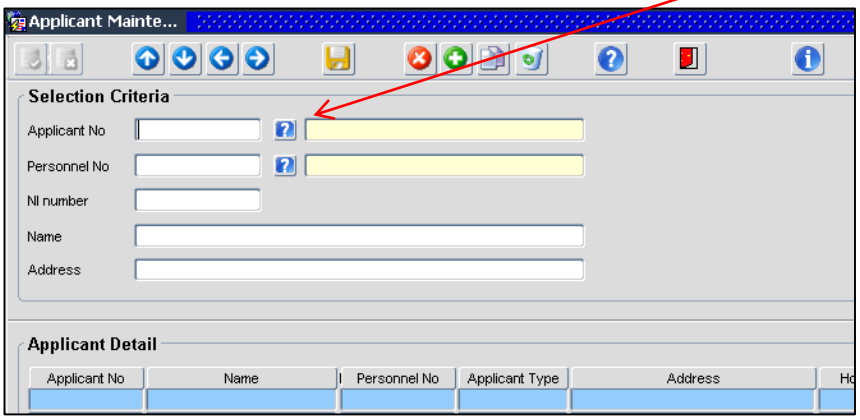
To locate an applicant already on the system, you need to be in the Applicant Maintenance screen.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

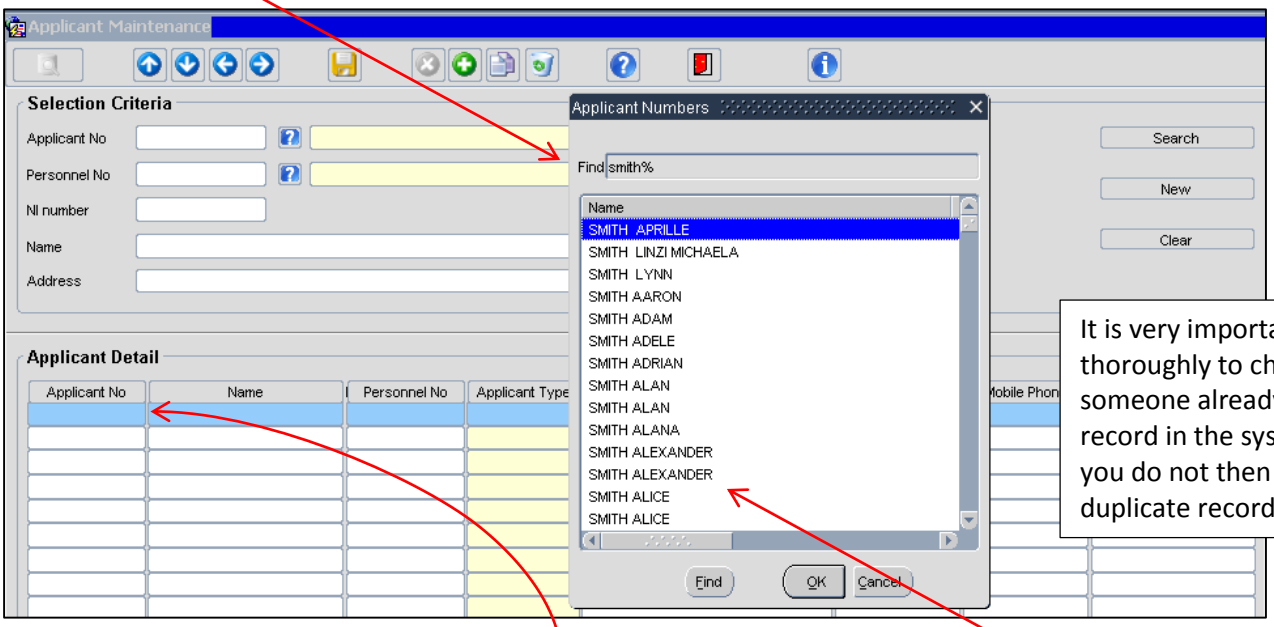
From within the eRecruitment back office, click on Core Personnel



Once the Applicant Maintenance screen opens search for your applicant by clicking on the **blue question mark.** (It may take a few seconds to open)



The box which opens shows the names of every single applicant. Type the person's **surname** before the % sign and press return. Double-click on the name you want to open. Then click **Search**



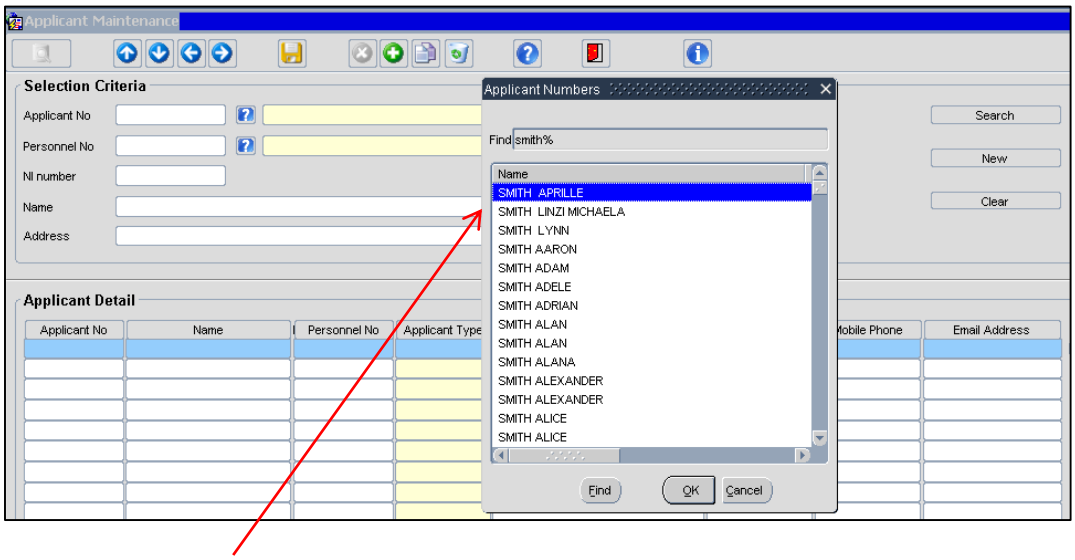
It is very important to search thoroughly to check whether someone already has a record in the system so that you do not then create a duplicate record

If the applicant is in the system and in your area, the name will appear in the **Applicant Detail** section of the screen. Double-click to open it. If the record does not open, see instructions over the page.

If there is more than one person with the same name you will need to open the record and check other information (like address or NI number) to identify the correct one

NB: It is possible to create more than one record for an applicant. Please DO NOT CREATE A SECOND RECORD for the same applicant. A duplicate record in eRecruitment would create a duplicate record on the Payroll and could result in someone being paid twice. It would also affect the person's access to various University systems.

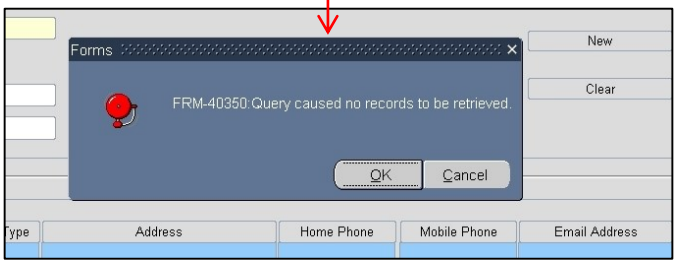
You may see an applicant's name in the full list of applicants but when trying to open the record, receive an error message. This indicates that the person exists on the database of applicants, but did not apply to a vacancy in the area of the recruiter who is searching for them.



When clicking on an applicant's name to open the record, you may receive this **error message**

If you see this error message, to have the person's record linked to the vacancy you should contact HR Systems team and request the applicant be linked to the vacancy. HR Systems team are the only ones able to do this task.

hr.systems@ed.ac.uk 0131 650 8126



The person's record being visible only to those in a limited area is a security feature in the system for Data Privacy. It provides protection to the applicant ensuring their application data is confidentially contained in the area to which they applied and not visible to the wider eRecruitment community within the University.

For example –

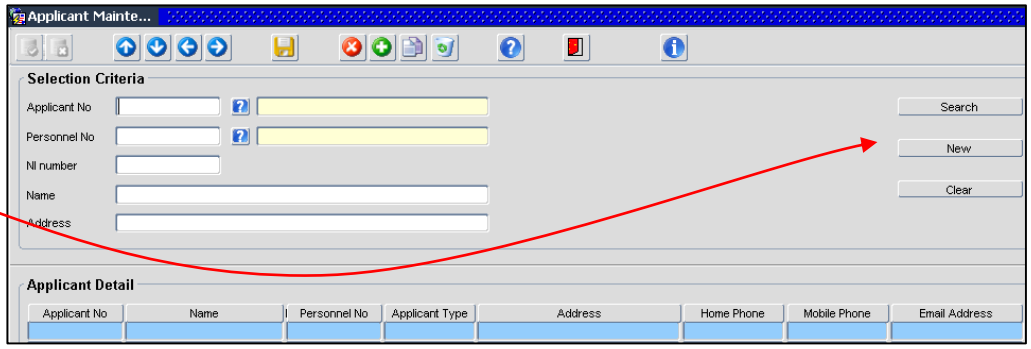
- James Collins applied online to a vacancy advertised by the School of Physics and Astronomy.
- At a later date, James Collins was considered for a vacancy advertised by School of Mathematics
- Mathematics want to appoint James Collins to their vacancy
- The recruiter searches to see if James Collins already has a record. He enters the name in the Name field. After clicking on the Search button, the above screen and error message is displayed. This person does have a record but is in a different area to the recruiter
- The recruiter contacts HR Systems team who then link the applicant to the vacancy

If after searching you are sure the applicant does not have a record you can create one for them. Go to section **b. How to create a new record (if you are sure a record does not already exist)** over the page

If the person does have an existing record, go to section **c. How to link a new or existing applicant's record to a vacancy** on page 16

b. How to create a new record (if you are sure a record does not already exist)

If you have searched for the person and you are sure the person does not already have a record, then click the **New** button to create an applicant.

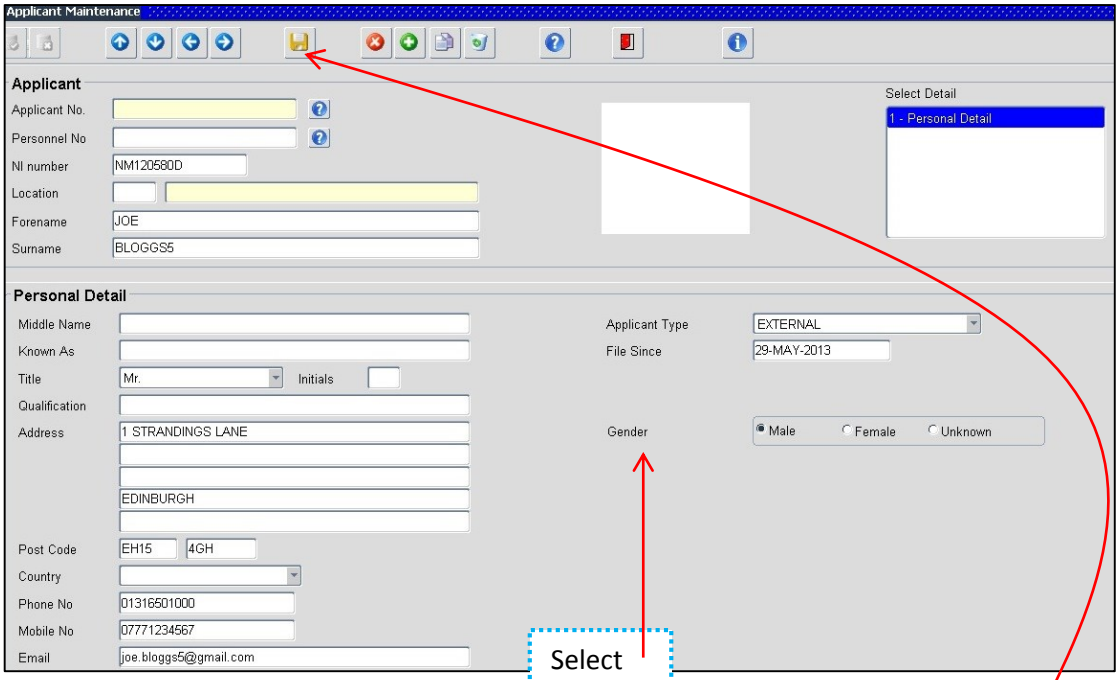


Enter data into the following fields:

NI number
Forename
Surname

Title

Address
Post Code
Phone No
Mobile No
Email

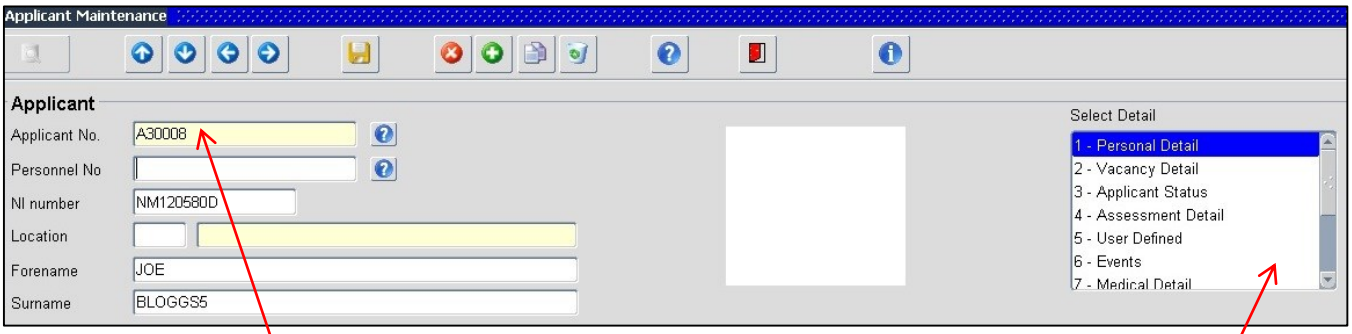


Select Gender

If an applicant does not have an NI number, enter one in the following format. (Only do this if you are sure they do not have one.) The applicant DOB is 12 May 1980. Enter like this NM120580D

Then **Save** this detail by clicking the icon. Then click OK

After you click the save button, you will see the following screen.



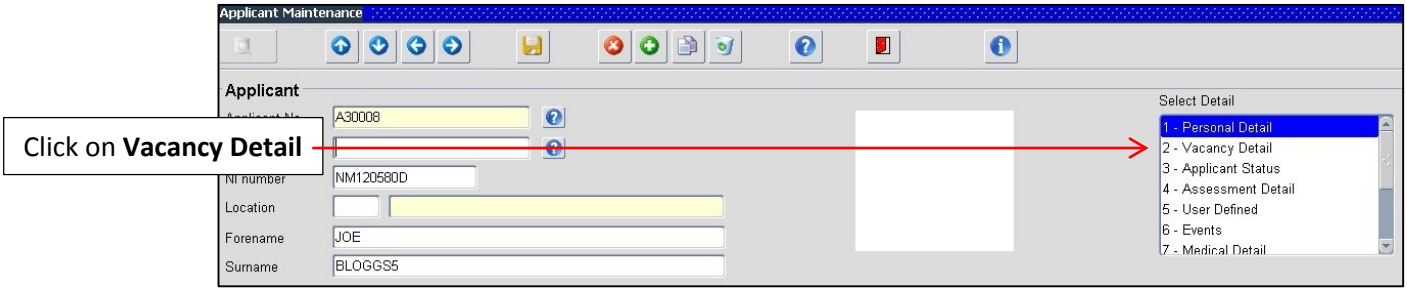
You can see an Applicant No. has been generated.

You can also see more options available in the **Select Detail** box.

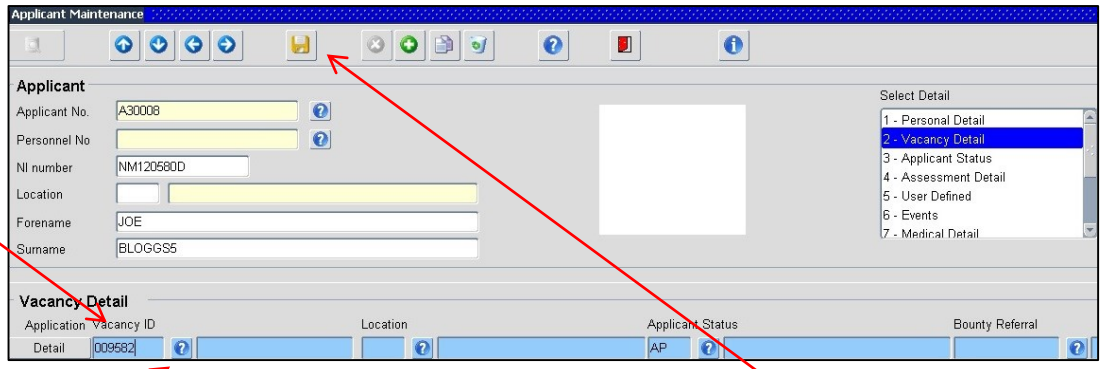
After you have created the new record you will need to contact HR Systems team hr.systems@ed.ac.uk 0131 650 8126 and request the DOB be added to the record. This should be done before you continue further.
Once the Date of Birth has been added, you can link the applicant to a vacancy.

c. How to link a new or existing applicant's record to a vacancy

Open the applicant's record.
(To do this, from the Core Desktop click on Core Personnel, then Recruitment, Recruitment maintenance, Applicant Detail)



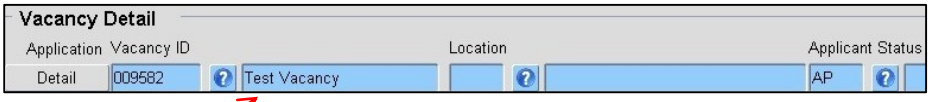
Click on **Vacancy Detail**



Type your vacancy number into the **Vacancy ID** field and press the **Tab** or **Enter** key on your keyboard.

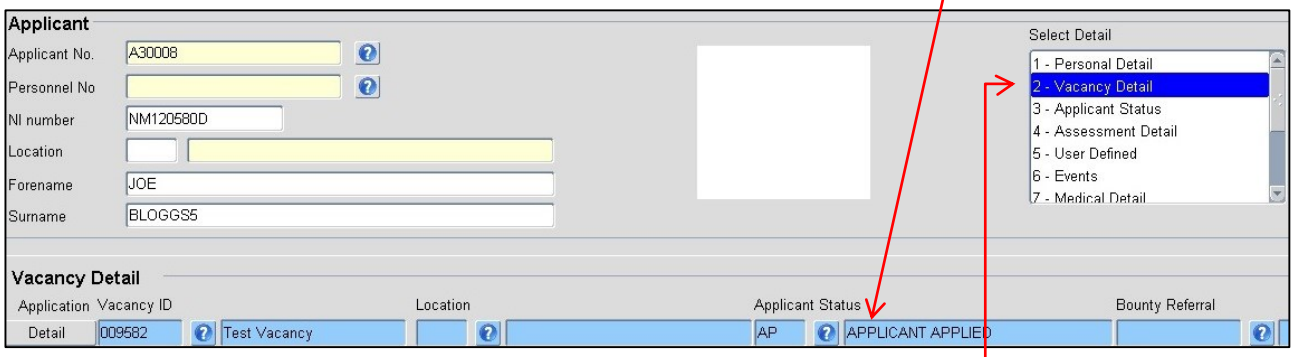
Alternatively, click the icon to choose from the list

To **Save,** click the icon. Then click OK



After the **description** of your vacancy is populated, you need to **Save** this to link it to the vacancy.

After you have saved the vacancy, your screen will have an applicant status showing "APPLICANT APPLIED" this is the default status when an applicant is linked to a vacancy.



If you want to further verify that the applicant is linked to your vacancy, click on **3 – Applicant Status.**

You can then continue with the rest of the recruitment process. The next step at this point would be the Before Offer Check.

How to view and filter the list of applicants for your vacancy

When candidates apply to your vacancy, they need to be submitted / accepted into the back office before you can do anything with them.

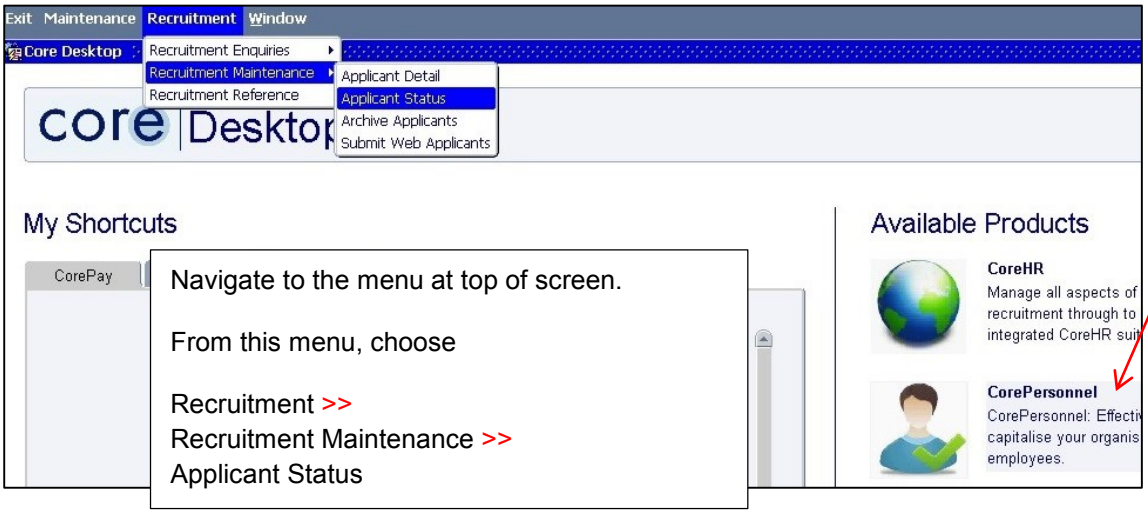
After applications have been submitted / accepted into the back office, you can view the list of applicants.

You can then click into individual applications and view more information and perform more actions.

To access your vacancy, you need to be in the **Applicant Status** screen.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

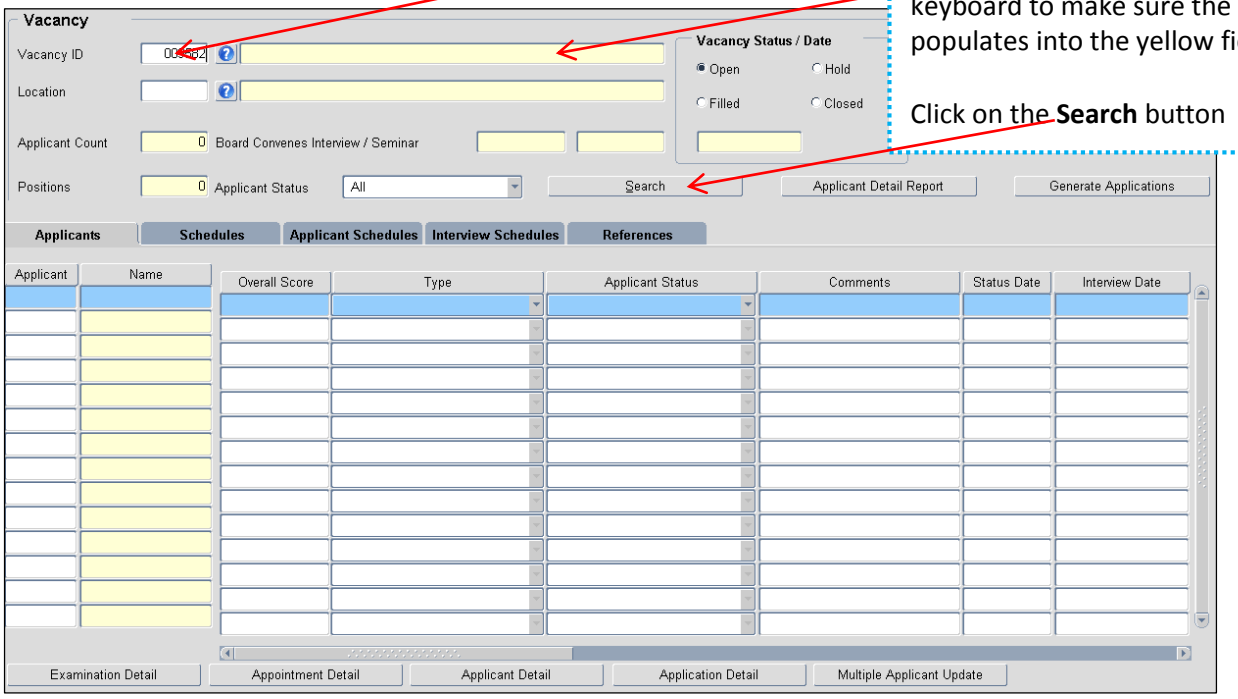
From within the eRecruitment back office, click on Core Personnel



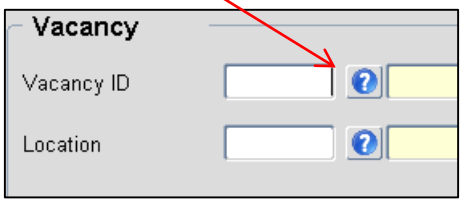
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button

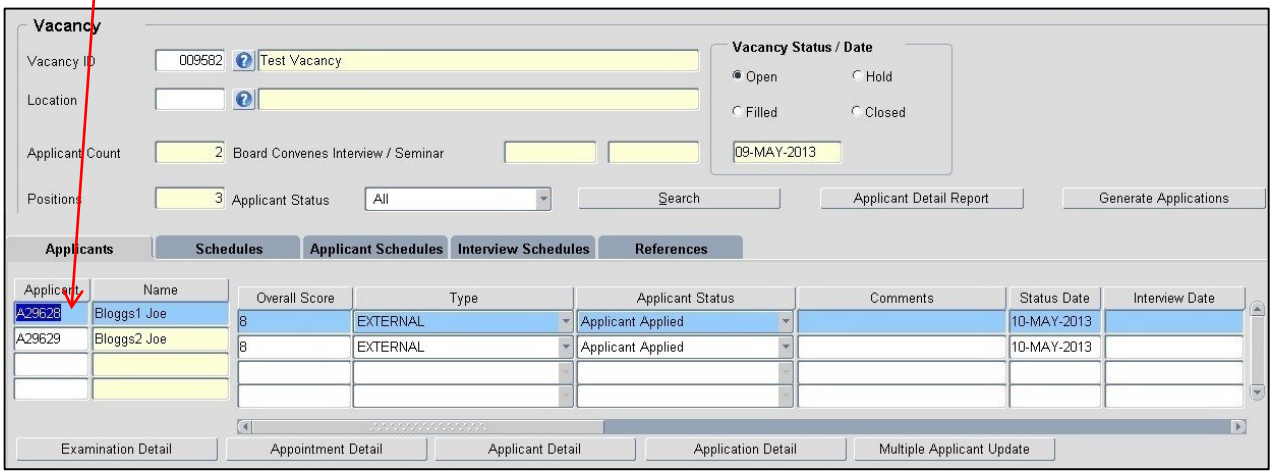


Alternatively, you can also search by the description of your vacancy, by clicking on the button.

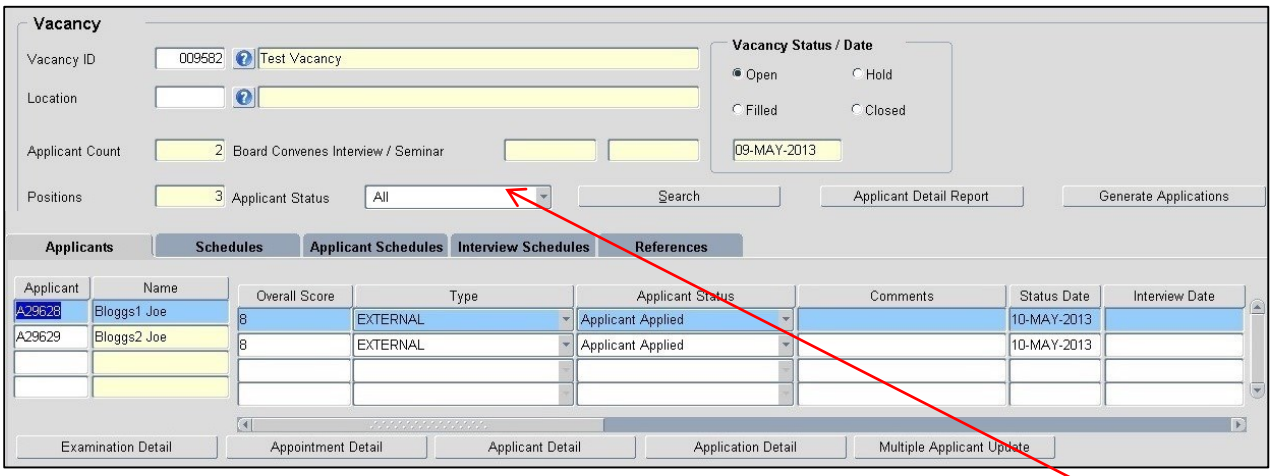


After clicking the Search button, your vacancy will return a list of applicants which have been submitted to back office.

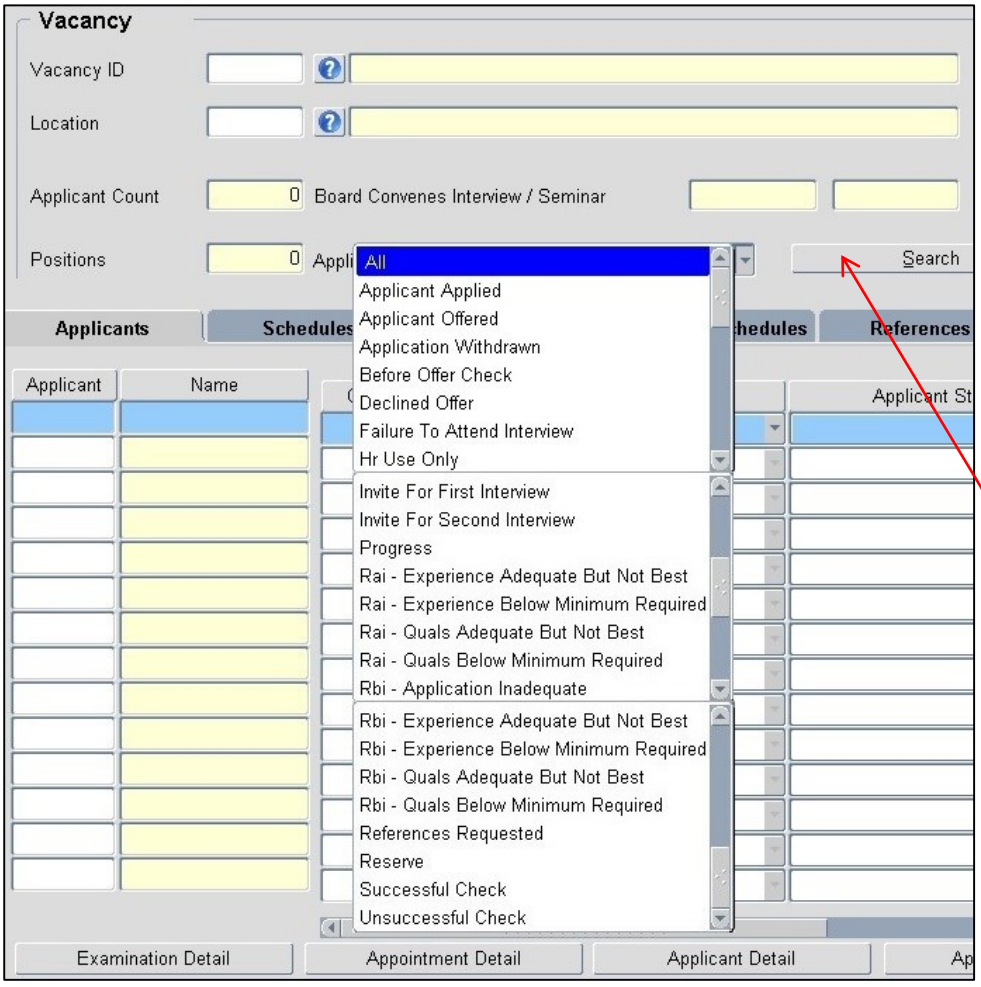
To open an applicant, you need to double-click into the field which shows the **Applicant** number.



Filtering applicants within a vacancy can be useful in order to view only applicants with a specific status, or when sending emails to applicants with a particular status.



Your applicants are listed in full. To change this via a filter, click the **Applicant Status** drop down list.



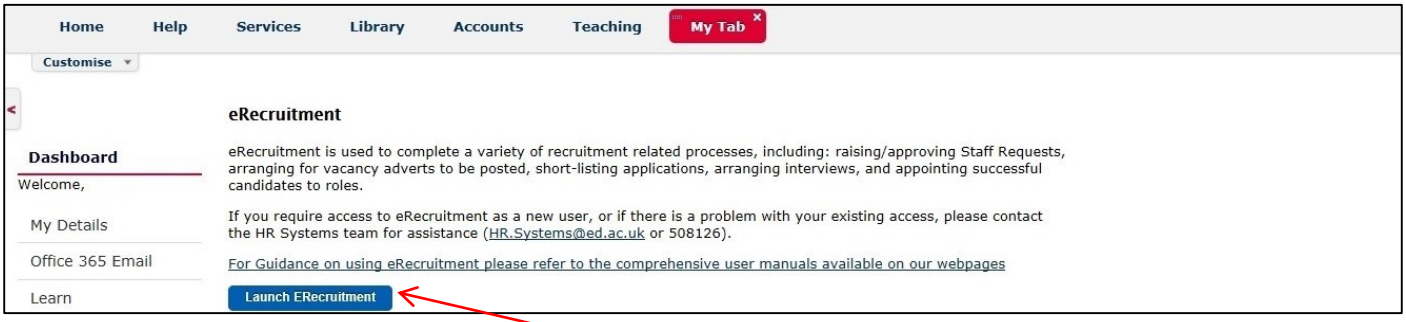
All the available filter options are listed.

Scroll down the page to allow you to choose.

Once you have selected one, you need to click on the **Search** button to activate the filter.

How to add or remove an interview or shortlisting panel member to a vacancy

Once the vacancy is live and showing in the vacancies listing (http://www.vacancies.ed.ac.uk), it is good practice to add the interview/ shortlisting panel into the vacancy.

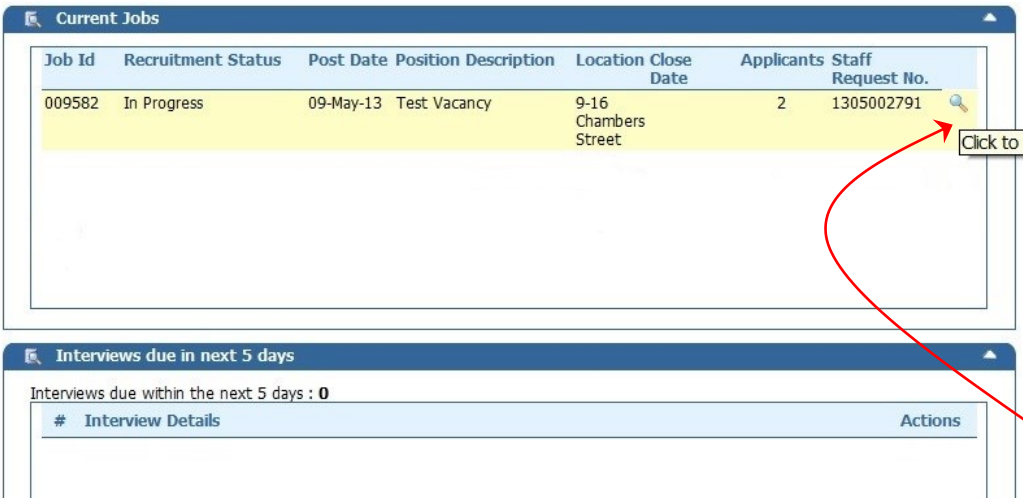


Click on the **Launch eRecruitment** button.

Before a staff member or non-staff member can be picked as an interviewer in the eRecruitment system, the individual needs to be added to the interview panel member list. If the Interviewer has not been added to the list, they will not be able to see the **My Vacancies** link in the portal.

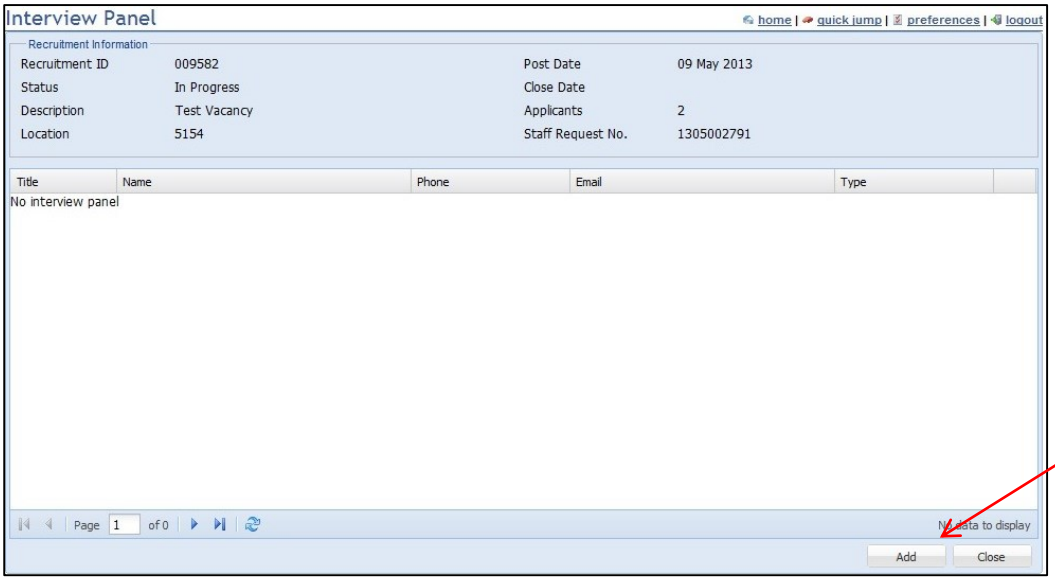
If the Interviewer cannot see the **My Vacancies** link, they should contact the Recruiter and request to be added to the Interview Panel members list within eRecruitment. Alternatively, contact the HR Systems team by email hr.systems@ed.ac.uk or phone 0131 650 8126.

Click the **My Vacancies** link and you will see the following screen

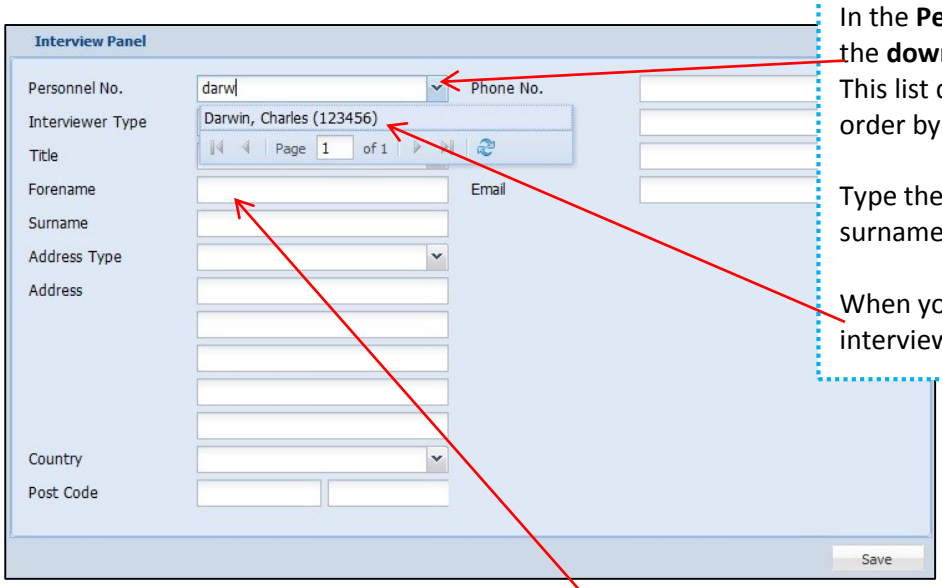


Within Current Jobs section, you will see a magnifying glass icon on the far right of each vacancy.

Click on the **magnifying glass** to view panel members.



Click on the **Add** button

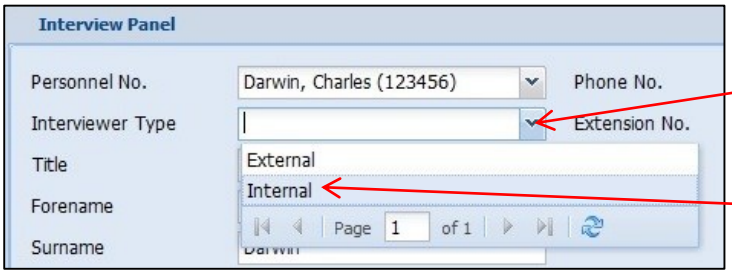


In the **Personnel No.** field, click on the **down arrow** to open the list. This list displays in alphabetical order by surname.

Type the first 3 or 4 letters of the surname.

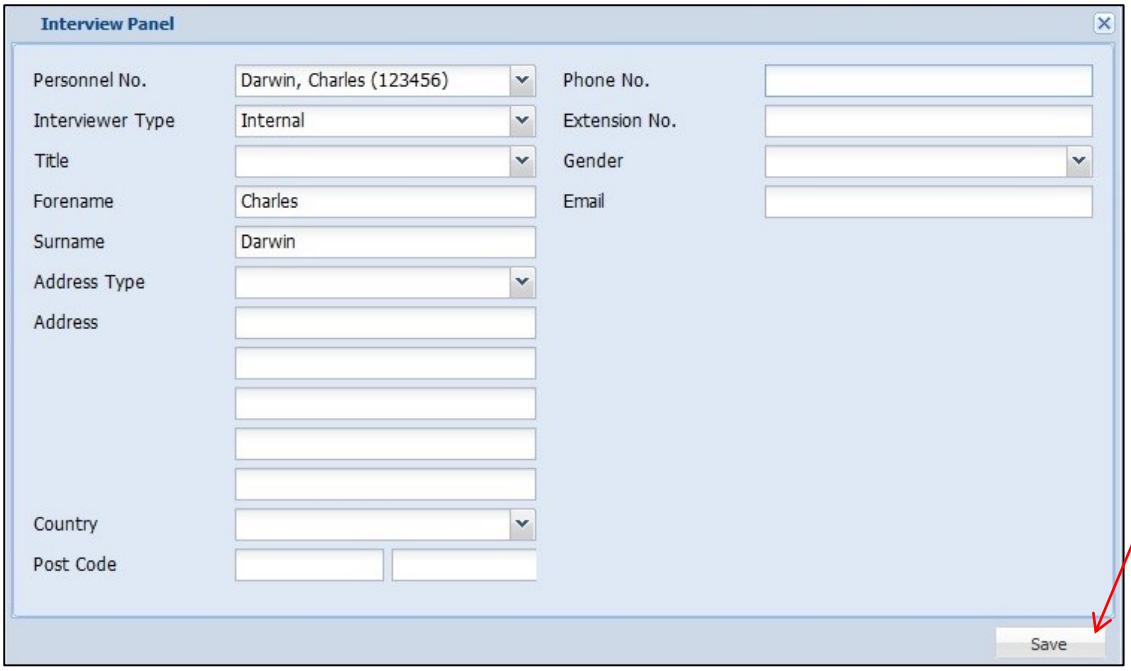
When you can see your interviewer, click on the full name

After you have chosen the interviewer, the **Forename** and **Surname** will automatically populate into the relevant fields.



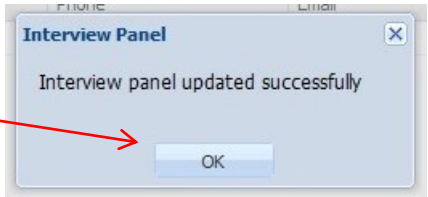
In the **Interviewer Type** field, click on the **down arrow** to open the list. This allows you to choose if they are staff or non-staff.

Click on the type



Now click the **Save** button.

Then click the **OK** button.

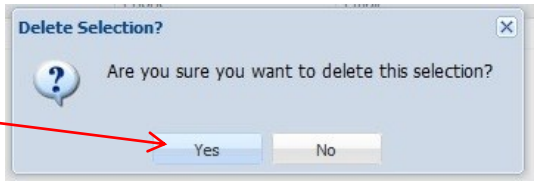


When adding a panel member, if you are unable to find the person you are looking for on the list, send an email request to hr.systems@ed.ac.uk or phone 0131 650 8126 - requesting your panel member be added to the interview panel member list.

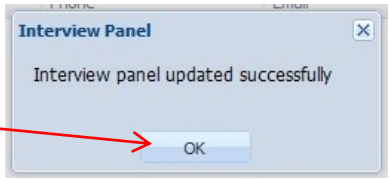
After you have added a panel member to your vacancy, a confirmation screen will indicate this.

If you want to remove a person from this list, you need to click on the icon on the far right of the interviewer name.

Click the **Yes** button.



Then click the **OK** button.



How to set up an interview schedule

Once the vacancy is live and showing in the vacancies listing (http://www.vacancies.ed.ac.uk), it is good practice to set up the interview schedule.

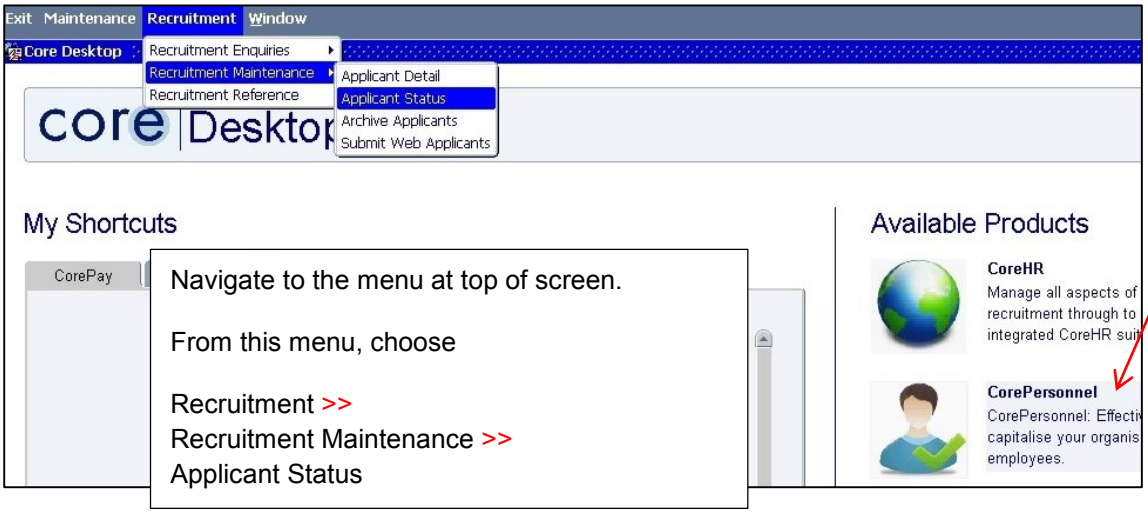
Applicants need to be assigned to the interview schedule so that the panel members can view applications electronically. Once assigned to the schedule, applicants who are invited to interview have the ability to choose from a pre-determined list of interview dates and times, which is set out by the Recruiter.

Interview panel members need to be assigned to the interview schedule so the panel member can view applications and times of interviews. Prior to adding panel members to the interview schedule, they need to be added as an interview panel member for the vacancy.

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

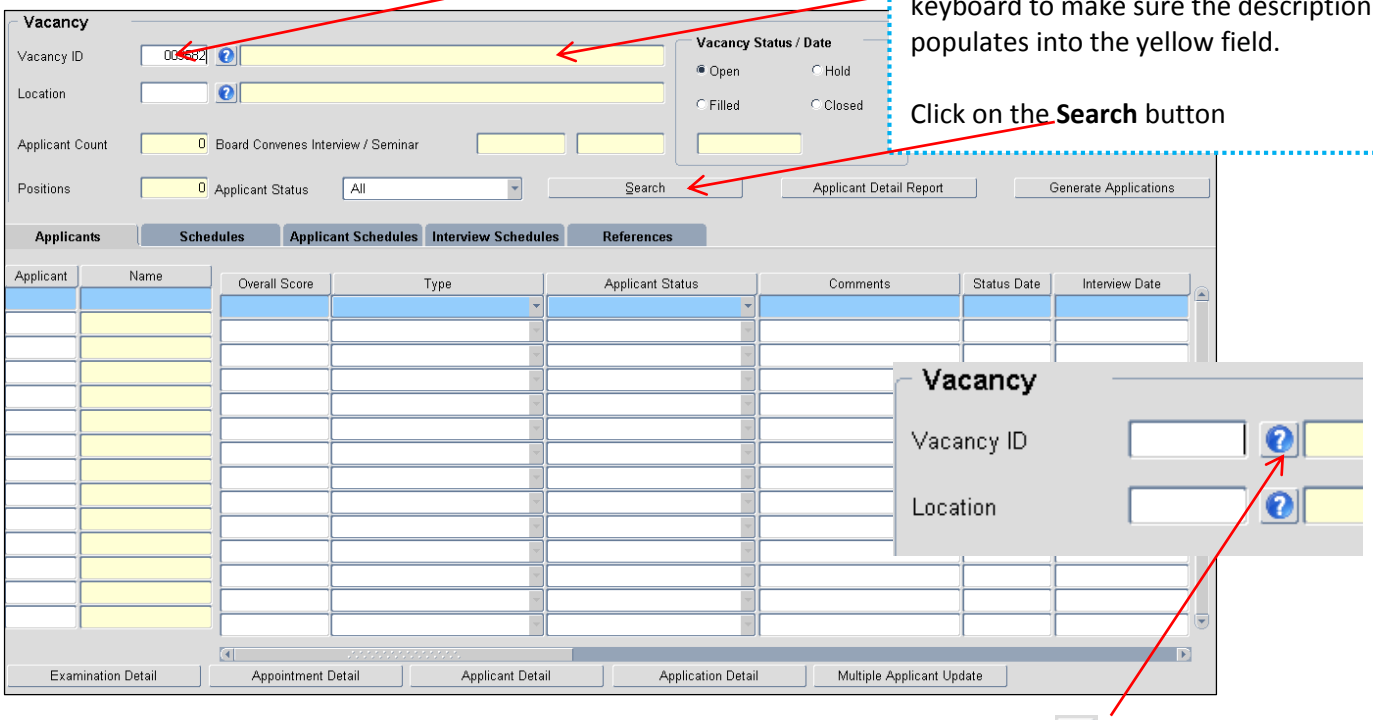
From within the eRecruitment back office, click on Core Personnel



Type your Vacancy number into the **Vacancy ID** field

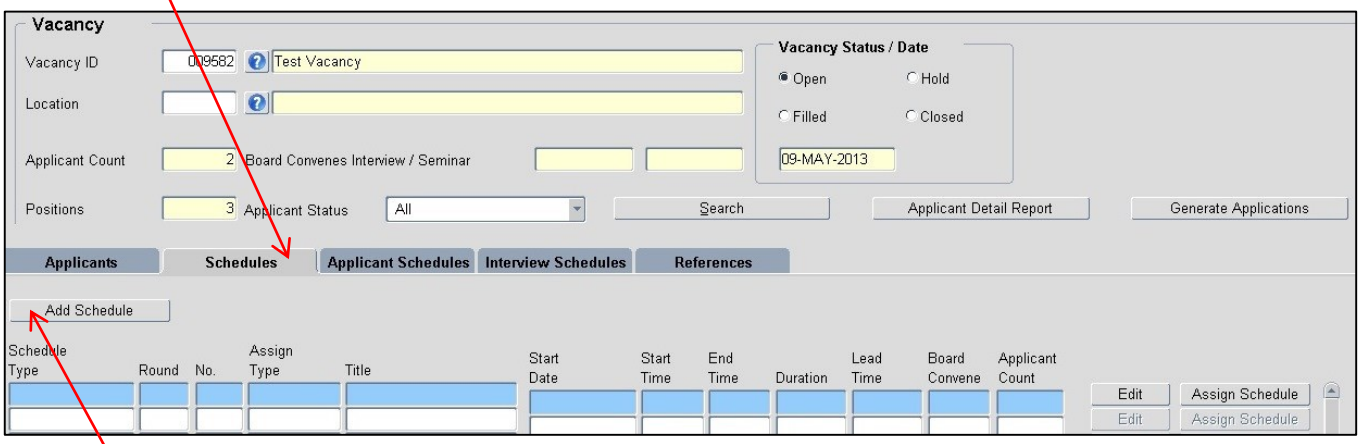
Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button

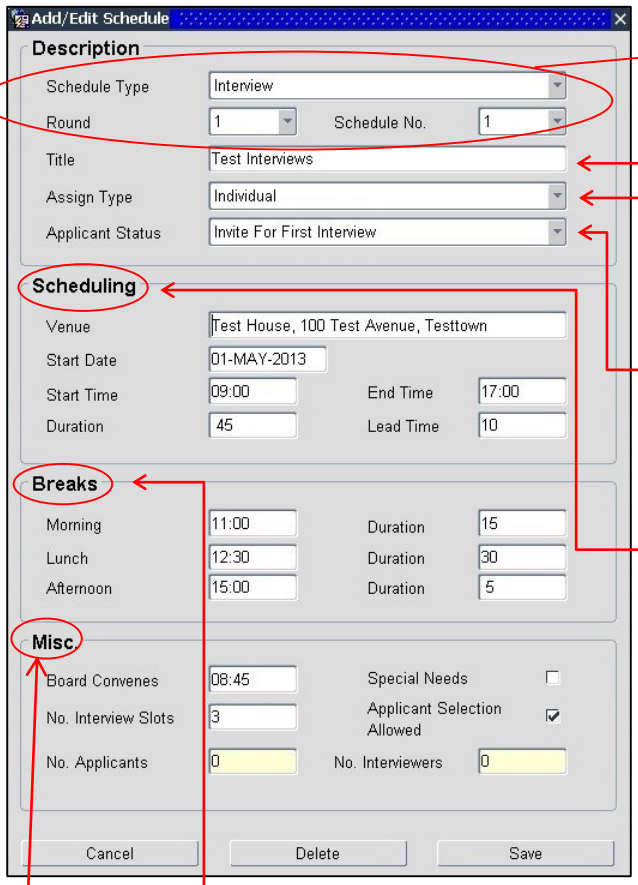


Alternatively, you can also search by the description of your vacancy, by clicking on the button.

Click on the **Schedules** tab



Click the **Add Schedule** button



Description Section

The, **Schedule Type**, **Round** and **Schedule No**. fields will be pre-populated. You do not need to do anything with these fields.

Title

Title of the interviews, tests etc. (Typically includes the title of the role)

Assign Type

Whether the interviews are group or individual

Applicant Status

Whether you are inviting people for first interview, second interview etc.

Scheduling Section – complete all fields

Venue: Where the interview will take place

Start Date: If only on one day, enter the date the interviews will take place

Start Time: This is the time that the first interview will start

End time: The time that the final interview will end

Duration: The duration of each in interview, in minutes

Lead time: The period of time between each interview, in minutes

Breaks Section

Morning: The time that the morning break will start

Lunch: The time that the lunch break will start

Afternoon: The time that the afternoon break will start

Duration: The duration of these breaks, in minutes

Misc Section

Board Convenes – The time at which the interview panel will meet

No. Interview Slots – The number of interview slots that are required

NB: The system will automatically make the interviews roll over to the next working day if there are too many slots for the date specified, taking into account breaks specified etc.

Applicant Selection Allowed – Applicants have the ability to select an interview slot themselves. Click this box if want to use this functionality.

NB: If you select this option, you can enter a number greater than the number of applicants being invited to interview in the **No. Interview Slots** field

Special Needs - You do not need to do anything with this.

Once you have completed the details, click Save (at the bottom right-hand side of the screen) and then OK.

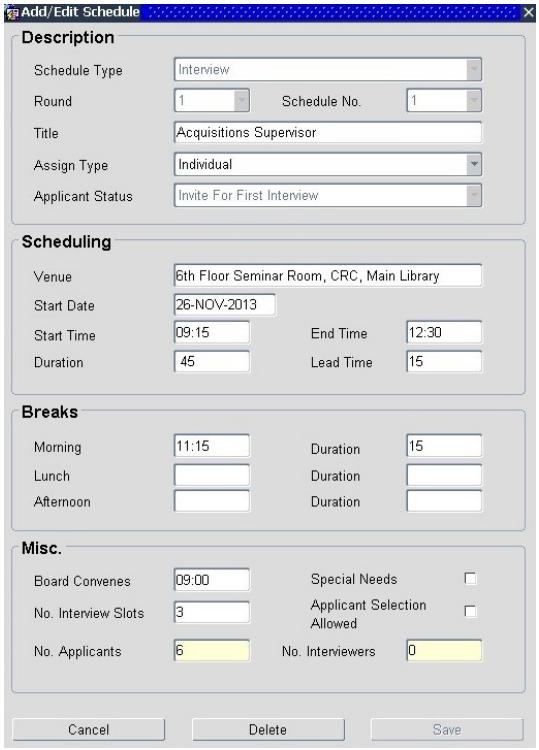
Example 1

There are 3 interviews which are 45 minutes in duration.
There is a 15 minute break between consecutive interviews.
There is a 30 minute morning break starting at 11:00

Board Convenes	09:00	
Start time	09:15	
1st Interview	09:15 to 10:00	+ 15 mins lead time
2nd Interview	10:15 to 11:00	+ 15 mins lead time
Morning Break	11:15	15 min duration
3rd Interview	11:30 to 12:15	+ 15 mins lead time
End time	12:30	

The morning break includes the 15 minutes lead time of the 2nd interview. Therefore, on the schedule, the morning break needs to be 11:15 for 15 minute duration.

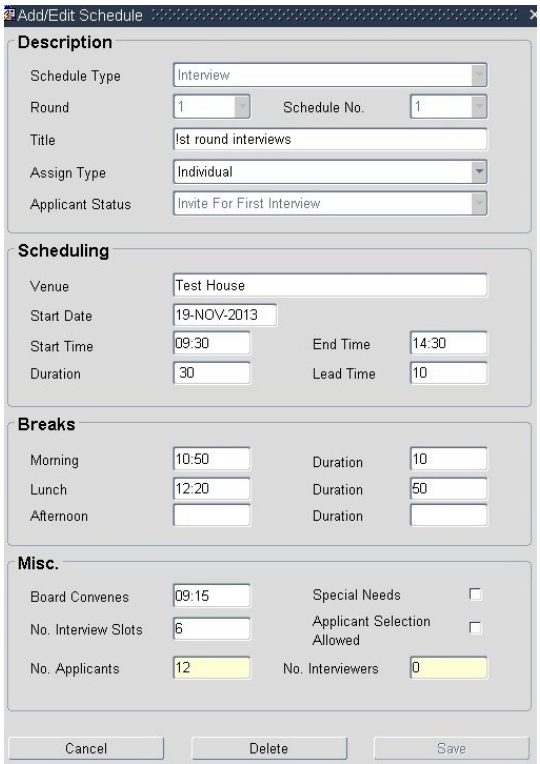
The End time should take into account the 15 minute lead time from the last interview and will be 12:30



Example 2

There are 6 interviews which are 30 minutes in duration.
There is a 10 minute break between consecutive interviews.
There is a 20 minute morning break starting at 10:40
There is a 60 minute lunch break starting at 12:10

Board Convenes	09:15	
Start time	09:30	
1st Interview	09:30 to 10:00	+ 10 mins lead time
2nd Interview	10:10 to 10:40	+ 10 mins lead time
Morning Break	10:50	10 min duration
3rd Interview	11:00 to 11:30	+ 10 mins lead time
4th Interview	11:40 to 12:10	+ 10 mins lead time
Lunch Break	12:20	50 min duration
5th Interview	13:10 to 13:40	+ 10 mins lead time
6th Interview	13:50 to 14:20	+ 10 mins lead time
End time	14:30	



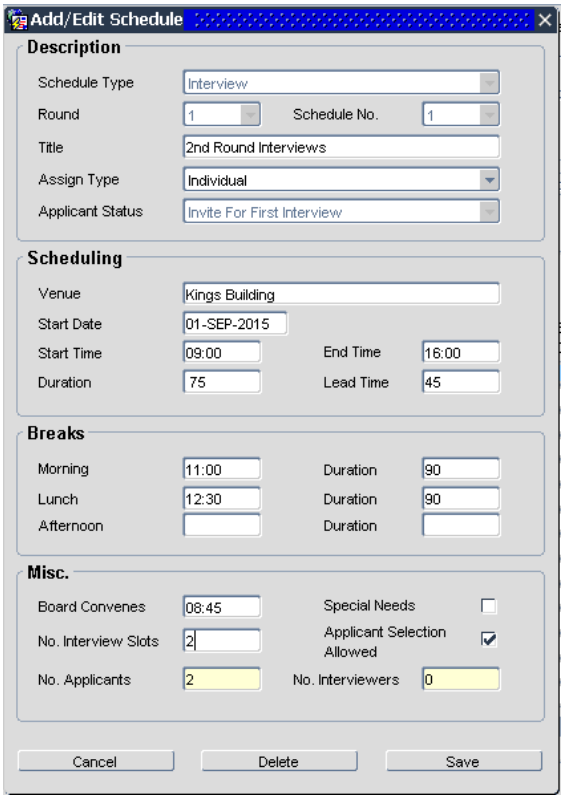
The morning break includes the 10 minutes lead time of the 2nd interview. Therefore, on the schedule, the morning break needs to be 10:50 for 10 minutes duration.

The lunch break includes the 10 minutes lead time of the 4th interview. Therefore, on the schedule, the lunch break needs to be 12:20 for 50 minutes duration.
The End time should take into account the 10 minute lead time from the last interview and will be 14:30

Example 3

This example is a scenario which could be used for "Invite to Second Interview". There are 2 Interviews which are 75 minutes in duration. They are to be conducted on the same day.
The 1st interview is to start at 9:00 am.
The 2nd interview is to start at 14:00 (2pm).
There is a large amount of time between the two interviews and we need to combine two breaks together.

Board Convenes		
Start Time	09:00	
1st Interview	09:00 to 10:15	+ 45 mins lead time
Morning Break	11:00	90 min duration
Lunch Break	12:30	90 min duration
2nd Interview	14:00 to 15:15	+45 mins lead time
End Time	16:00	



Example 4

This example is more complicated due to its requirement. The requirement is as follows:

a) Interviews are to be held over three consecutive work days.
b) Although interview start times are the same format, no day is consistent with another for timings.
c) Applicants need to be able to log into eRecruitment and choose their own interview time slot.

Interview Schedule					
Day 1 - Wed 2nd Sep 2015		Day 2 - Thur 3rd Sep 2015	10.30am - 12.00pm	Day 3 - Fri 4th Sep 2015	10.30am - 12.00pm
Day 1 - Wed 2nd Sep 2015	1.30pm - 3.00pm	Day 2 - Thur 3rd Sep 2015	1.30pm - 3.00pm	Day 3 - Fri 4th Sep 2015	1.30pm - 3.00pm
Day 1 - Wed 2nd Sep 2015	3.30pm - 5.00pm	Day 2 - Thur 3rd Sep 2015	3.30pm - 5.00pm	Day 3 - Fri 4th Sep 2015	

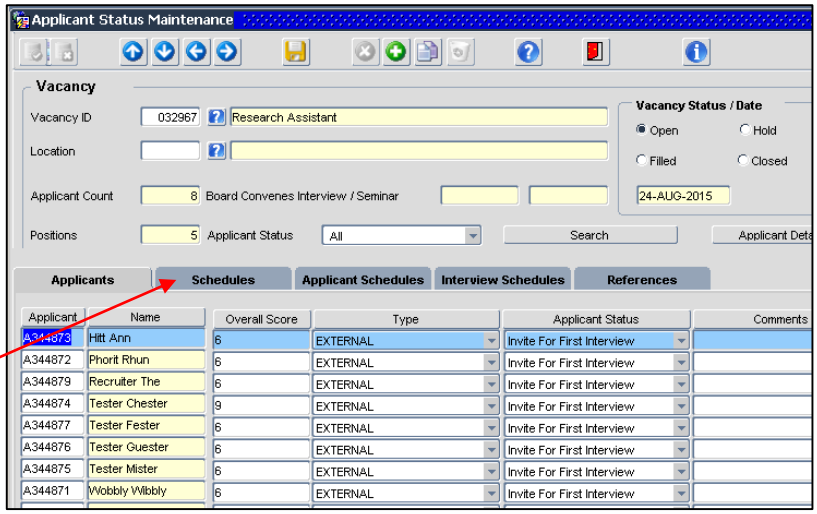
Each Interview is 90 minutes long with a 30 minute break between interviews.

Day 1 does not have an interview prior to the lunch break. However, Day 2 and Day 3 do have interviews prior to the lunch break. Because of this, we need an extra interview to be added to help with allowing the lunch break to be applied to all three days.

In this example, the Recruiter linked their own applicant number to the vacancy. The Recruiter then set their applicant status to Invite For First Interview. As the Recruiter is now an applicant on the vacancy, they can log in to vacancies website and choose the 1st time that is available before any of the applicants can choose. The Recruiter chose the 1st interview slot on Day 1 which was 10:30am. This means applicants will only be able to choose from 13:30 on Day 1 onwards.

Navigate to screen:
Core Personnel > Recruitment > Recruitment Maintenance > Applicant Status

Then click on the Schedules tab.



Click on Add Schedule and enter the date of Day 1 into Start Date. In this example, 02-Sep-2015.

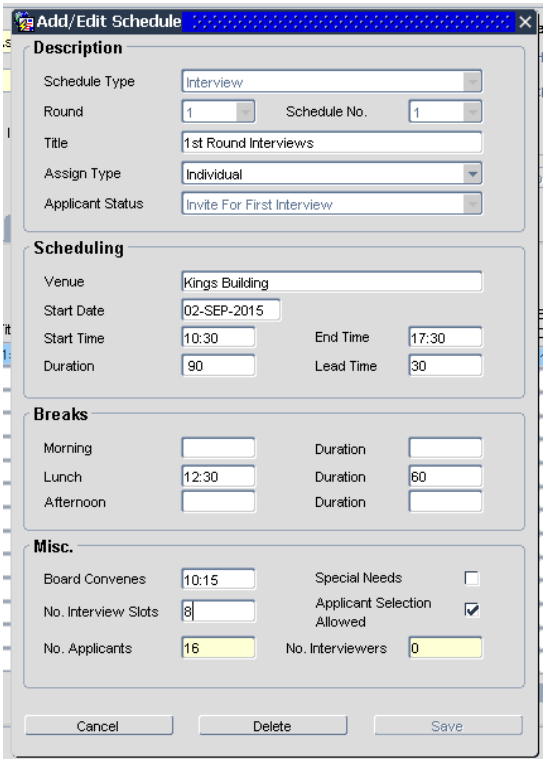
The earliest interview time over all 3 days is 10:30am, so enter 10:30 into Start Time.
The duration of each interview is 90 minutes with a 30 minute break between interviews. So enter 90 in the Duration field and 30 in the Lead time field. The End Time field is 17:30 as it needs to take 30 min lead time into account.

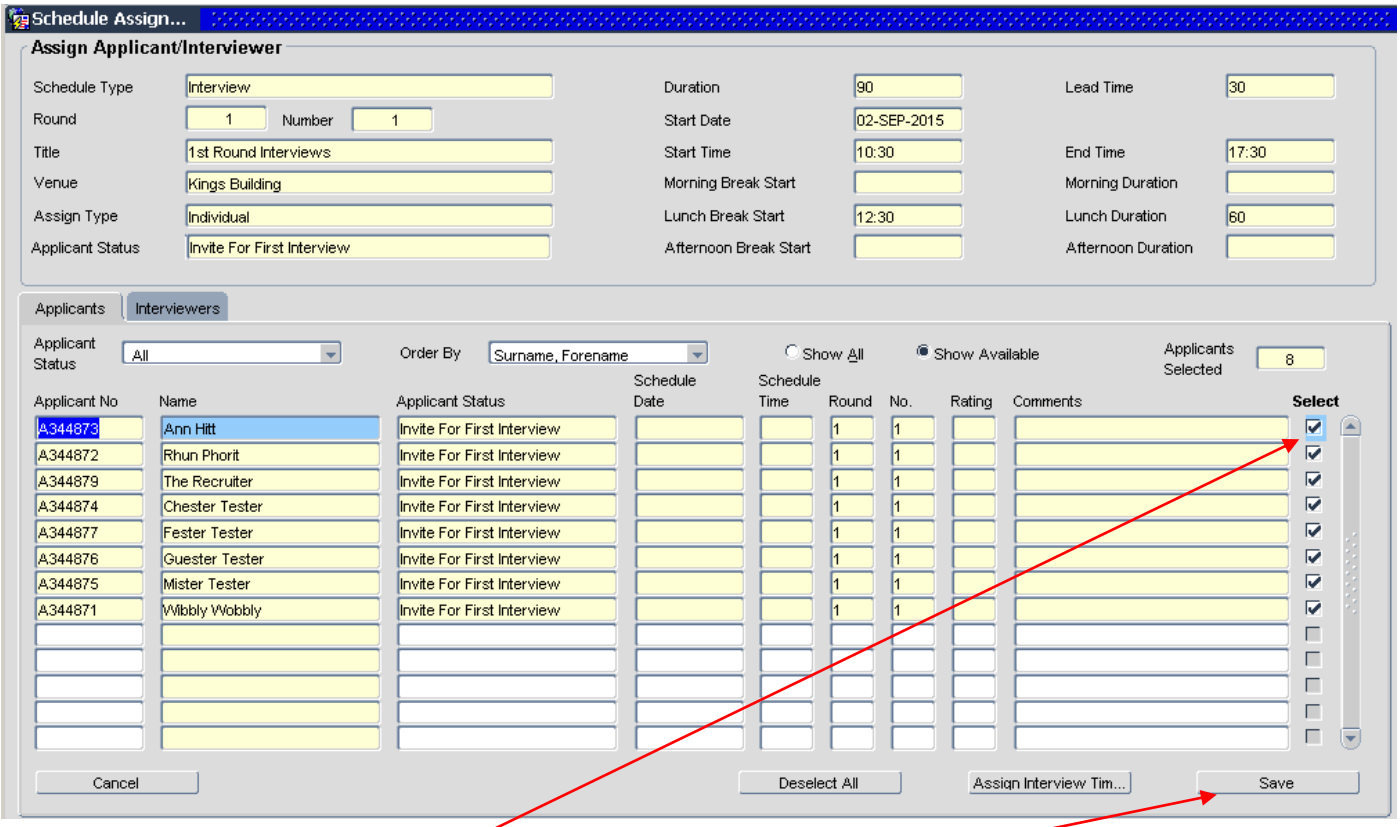
The 10:30-12:00 interview will have the lead time of 30 minutes applied to it. This means the lunch break will start at 12:30. As the 2nd Interview starts at 1:30pm, the lunch break on the schedule will be 60 minutes. So enter 12:30 in Lunch field and 60 in the corresponding Duration field.

There are only 7 interviews. However, we need to put 8 into the No. Interview Slots field to allow for the Day 1 10:30am slot which is not going to be filled. When typing 8 into the No. Interview Slots field, it will not provide an interview slot for the 3rd day at 15:30 as it will consider the 13:30 interview on day 3 to be the 8th and last interview. We also want applicants to be able to log into www.vacancies.ed.ac.uk and choose their own time, so check the Applicant Selection box.

Day 1	Board Convenes	10:15	
Day 1	Start Time	10:30	
Day 1	**1st Interview**	**10:30 to 11:45**	**+ 30 mins lead time**
Day 1	Lunch Break	12:30	60 min duration
Day 1	2nd Interview	13:30 to 15:00	+30 mins lead time
Day 1	3rd Interview	15:30 to 17:00	+30 mins lead time
Day 1	End Time	17:30	
Day 2	Board Convenes	10:15	
Day 2	Start Time	10:30	
Day 2	1st Interview	10:30 to 11:45	+ 30 mins lead time
Day 2	Lunch Break	12:30	60 min duration
Day 2	2nd Interview	13:30 to 15:00	+30 mins lead time
Day 2	3rd Interview	15:30 to 17:00	+30 mins lead time
Day 2	End Time	17:30	
Day 3	Board Convenes	10:15	
Day 3	Start Time	10:30	
Day 3	1st Interview	10:30 to 11:45	+ 30 mins lead time
Day 3	Lunch Break	12:30	60 min duration
Day 3	2nd Interview	13:30 to 15:00	+30 mins lead time
Day 3	**3rd Interview**	**15:30 to 17:00**	**+30 mins lead time**
Day 3	End Time	17:30	

NB: Red items are placeholders rather than actual interviews.





The next step is to ensure the **Select** box is ticked for all the applicants with Invite for First Interview.
After the Select box is ticked, ensure you click on the Save button. Then the cancel button to take you back.
It is imperative, to select the applicant and then save the change. If you forget to do this, the applicants will not be able to choose a time when they log into www.vacancies.ed.ac.uk. If the interview date is in the past, applicants will not be able to choose a time.

NB: If you are a Recruiter and you have linked yourself to a vacancy for the purposes of setting up a complex interview schedule as per this example, please remember to un-link yourself from the vacancy after you have completed the recruitment. Failure to un-link yourself from the vacancy will result in distorted information being included in management information reporting.

In this example, we will log into the vacancies website to illustrate how to select an interview slot.

The applicant would click on Application History and in the row of the job they applied to, it will show an icon in the Schedule Interview column.

The University of Edinburgh

Server Date/Time: 24-August-2015 14:53

Welcome The Recruiter

Navigation Section

- Search Vacancies
- Application History
- Job Specification Click to view the current job specification
- My Account Change email address and register for vacancy notifications
- My Profile Submit a speculative application (this facility will go live in 2015)
- Terms & Conditions
- University of Edinburgh
- Change Password
- Log Out
- Edinburgh University Staff Registration

Online Interview Selection

Research Assistant

1st Round Interviews

Date Available	Time Available	Select
Wednesday, 2nd Sep 2015	10:30	◉
Wednesday, 2nd Sep 2015	13:30	○
Wednesday, 2nd Sep 2015	15:30	○
Thursday, 3rd Sep 2015	10:30	○
Thursday, 3rd Sep 2015	13:30	○
Thursday, 3rd Sep 2015	15:30	○
Friday, 4th Sep 2015	10:30	○
Friday, 4th Sep 2015	13:30	○

Back Submit

The Recruiter can choose the interview slot that is not being offered to the applicants.

After the applicant has clicked on the Submit button, we can see in the back office, that one of the interview slots has been updated

Schedule Assign...

Assign Applicant/Interviewer

Schedule Type	Interview	Duration	90	Lead Time	30
Round	1 Number 1	Start Date	02-SEP-2015		
Title	1st Round Interviews	Start Time	10:30	End Time	17
Venue	Kings Building	Morning Break Start		Morning Duration	
Assign Type	Individual	Lunch Break Start	12:30	Lunch Duration	60
Applicant Status	Invite For First Interview	Afternoon Break Start		Afternoon Duration	

Applicants | Interviewers

Applicant Status: All — Order By: Surname, Forename — Show All — Show Available — Applicants Selected

Applicant No	Name	Applicant Status	Schedule Date	Schedule Time	Round	No.	Rating	Comments
A344873	Ann Hitt	Invite For First Interview			1	1		
A344872	Rhun Phorit	Invite For First Interview			1	1		
A344879	The Recruiter	Invite For First Interview	02-SEP-2015	10:30	1	1		
A344874	Chester Tester	Invite For First Interview			1	1		
A344877	Fester Tester	Invite For First Interview			1	1		
A344876	Guester Tester	Invite For First Interview			1	1		
A344875	Mister Tester	Invite For First Interview			1	1		
A344871	Wibbly Wobbly	Invite For First Interview			1	1		

When we log in as one of the remaining applicants, we can only see interview slots from 1:30pm on 2nd Sep 2015.

The University of Edinburgh

Server Date/Time: 24-August-2015 15:14

Welcome Chester Tester

Navigation Section

- Search Vacancies
- Application History
- Job Specification Click to view the current job specification
- My Account Change email address and register for vacancy notifications
- My Profile Submit a speculative application (this facility will go live in 2015)
- Terms & Conditions
- University of Edinburgh
- Change Password
- Log Out

Online Interview Selection

Research Assistant

1st Round Interviews

Date Available	Time Available	Select
Wednesday, 2nd Sep 2015	13:30	○
Wednesday, 2nd Sep 2015	15:30	○
Thursday, 3rd Sep 2015	10:30	○
Thursday, 3rd Sep 2015	13:30	○
Thursday, 3rd Sep 2015	15:30	○
Friday, 4th Sep 2015	10:30	○
Friday, 4th Sep 2015	13:30	○

Back Submit

At this point, the Recruiter can send an email to applicants advising them to log into eRecruitment and choose a timeslot.

After all the slots have been allocated, the recruiter should unlink themselves from the vacancy.

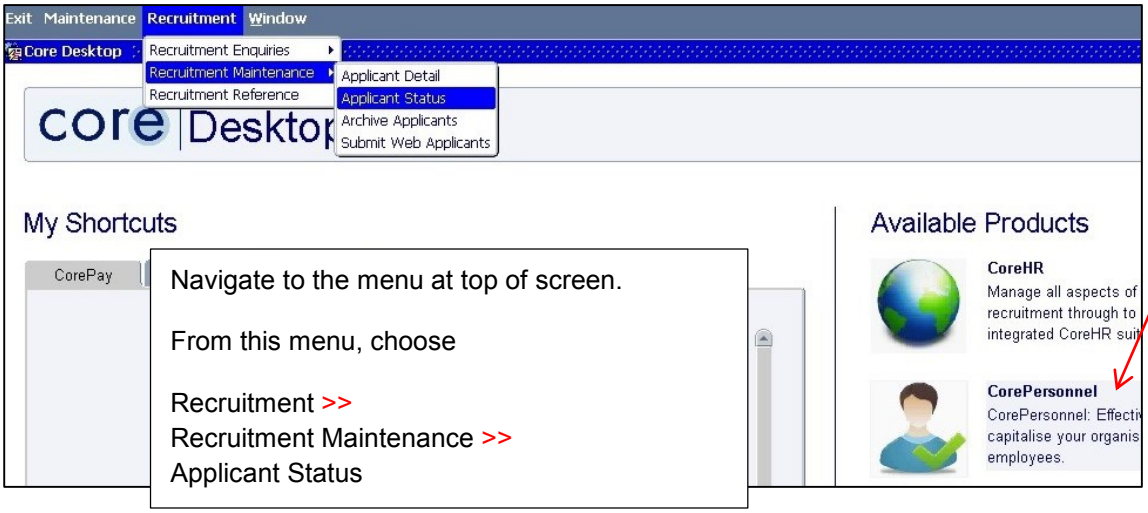
How to assign interview panel members to an interview schedule

In order to do this, you will need to have created an interview schedule.

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

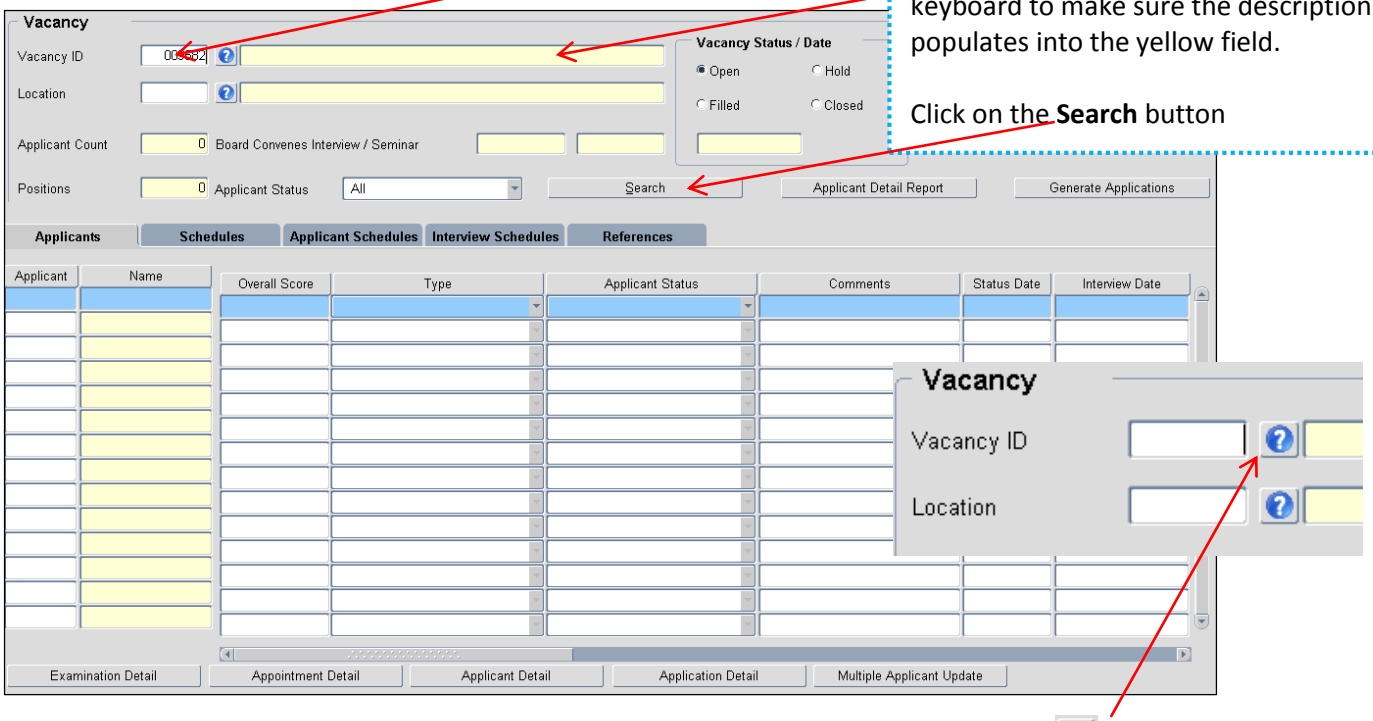
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

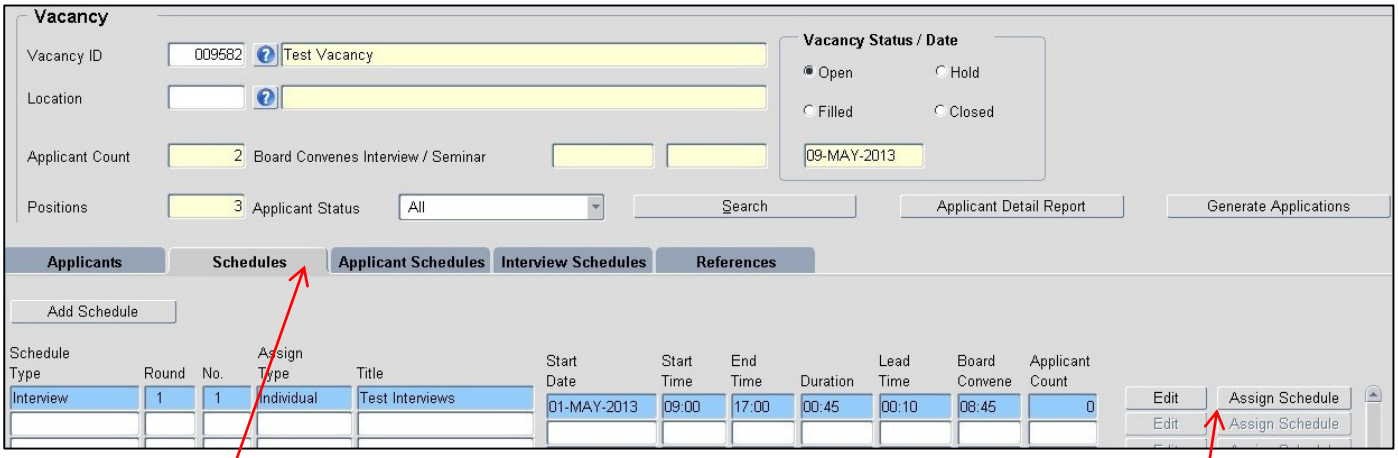
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button

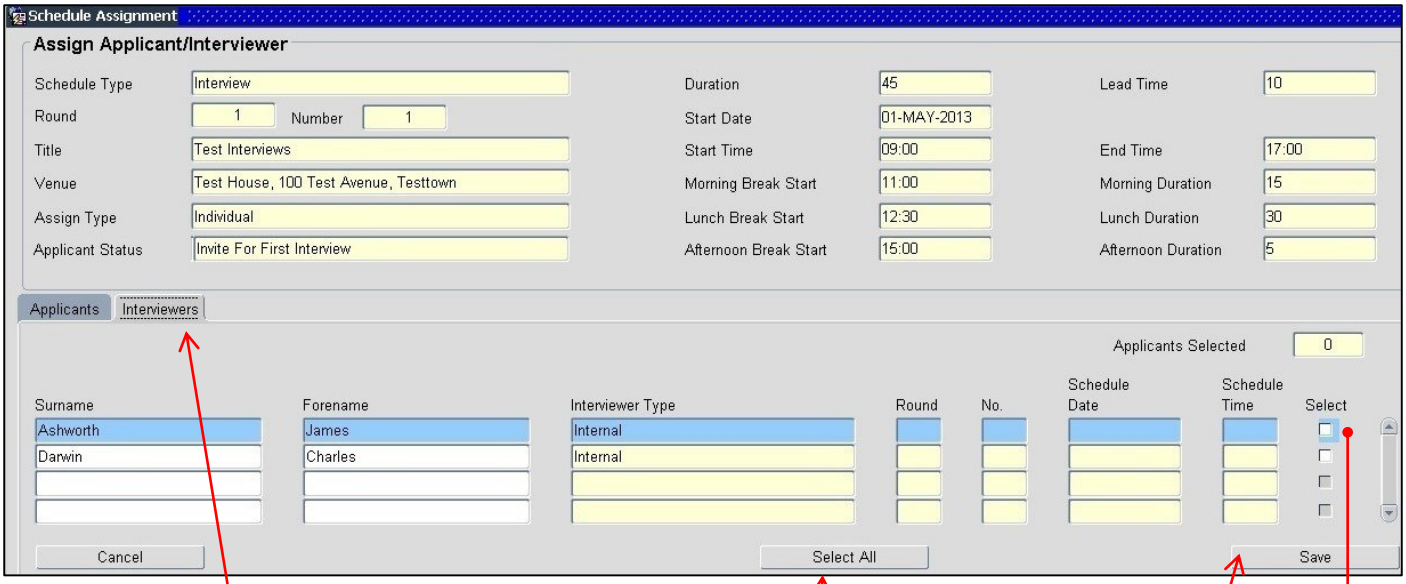


Alternatively, you can also search by the description of your vacancy, by clicking on the button.



Click on **Schedules** tab

Click on the **Assign Schedule** button



Click on **Interviewers** tab

You should now be able to see your interviewers. If you cannot see any names, it is possible you haven't added the interview panel member to your vacancy.

Even though your interviewers are now visible, you have to actually select the ones you want to be assigned to the interview schedule.

To select everyone, click on the **Select All** button.

Then click **Save**
Then click **OK**

Alternatively, you can click in the **Select** box to the right of each individual. Once selected, a **tick** will appear in the box. Then click **Save.** Then click **OK**

If a panel member has already been assigned to another schedule at the time you are trying to assign them to your schedule, the system will inform you so there is no risk of the interviewer being double booked.

NB: The Recruiter will need to notify the interview panel member of all the details relating to interview, including location, breaks and the time that the panel is expected to convene.

When the interview panel member is aware of their involvement, they can view the details.
The interviewer clicks on **Launch ERecruitment** button within myEd and then clicks on **My Vacancies**, then clicks on the **Vacancy** number in the Job Id column.

Current Jobs

Job Id	Recruitment Status	Post Date	Position Description	Location	Close Date	Applicants	Staff Request No.
009582	In Progress	09-May-13	Test Vacancy	9-16 Chambers		2	1305002791

How to assign applicants to an interview schedule

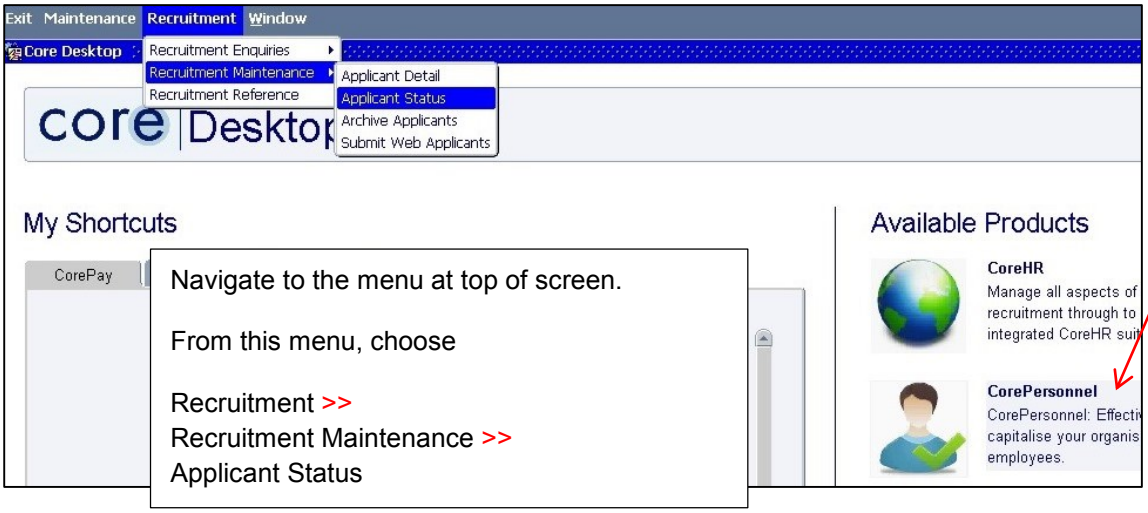
In the first instance, it is good practice to have:

- accepted applications into the back office – submit web applicants
- formed an opinion on which applicants will be shortlisted for interview
- updated applicant status to invite for first interview or invite to second interview
- created an interview schedule

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

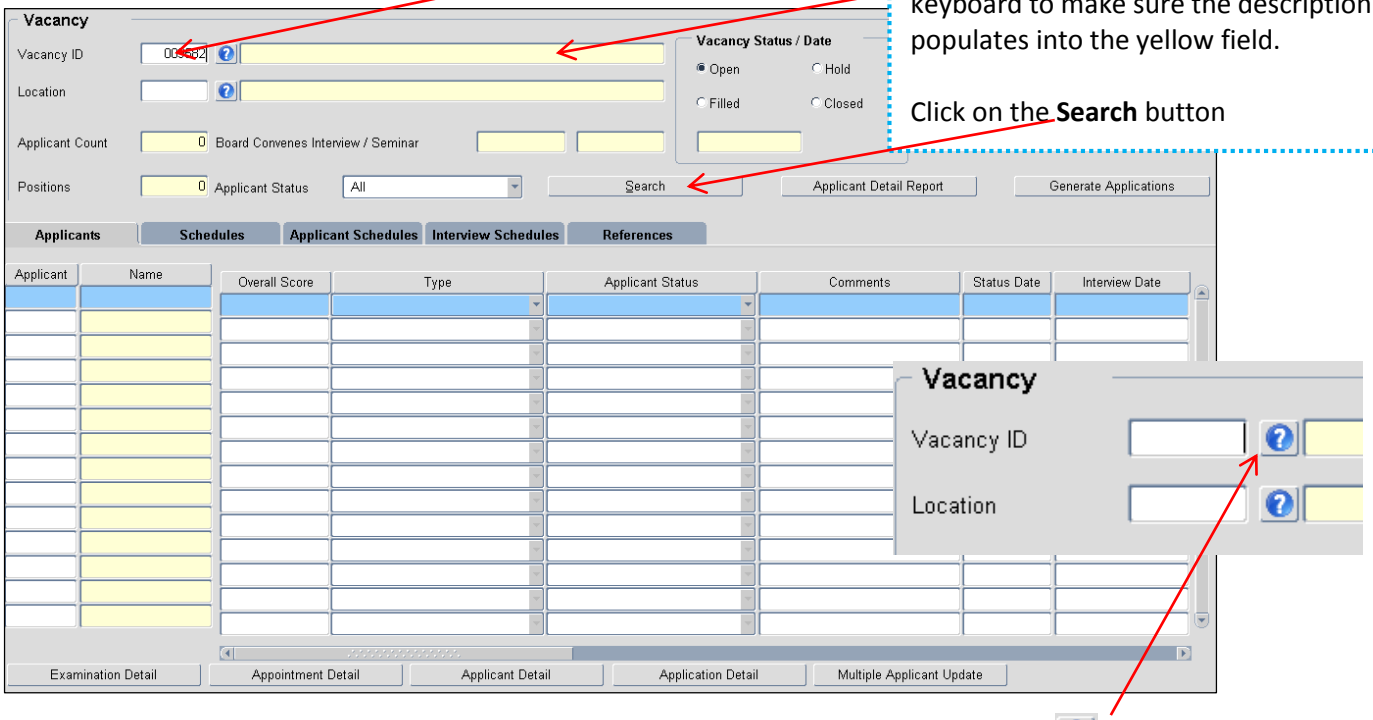
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

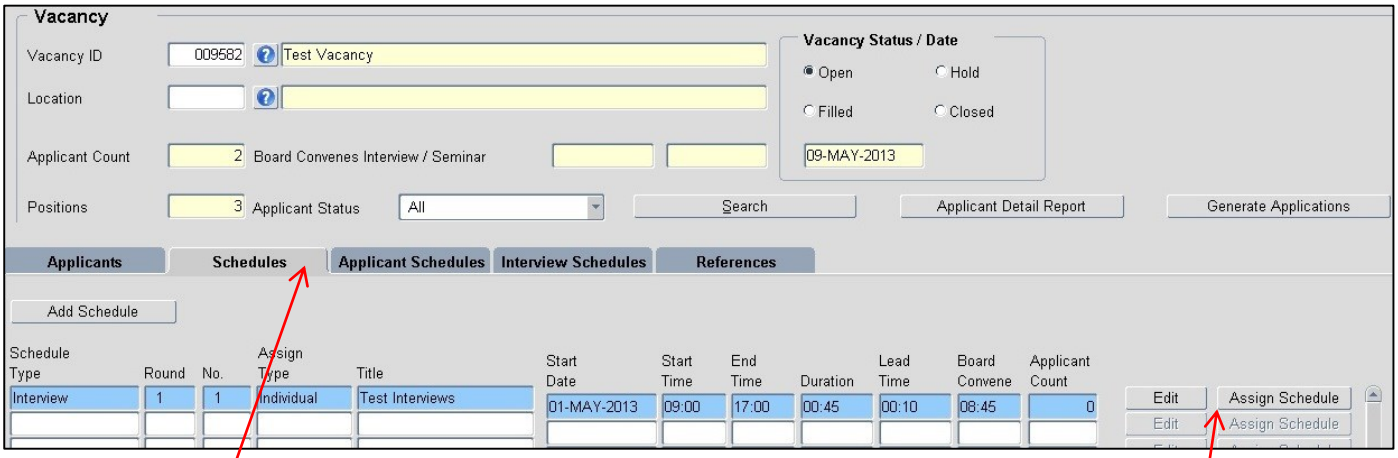
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button

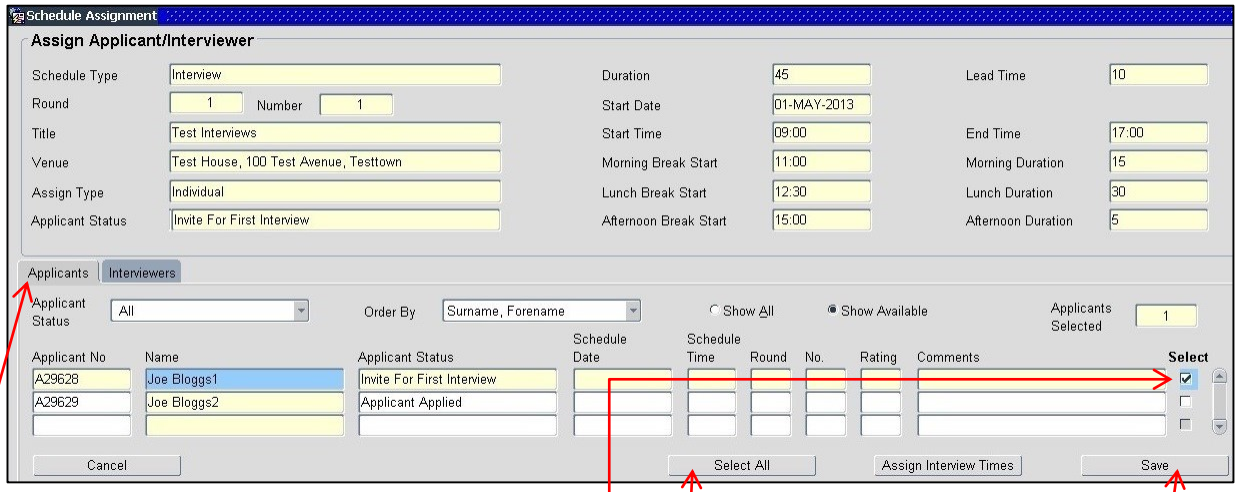


Alternatively, you can also search by the description of your vacancy, by clicking on the button.



Click on **Schedules** tab

Click on the **Assign Schedule** button



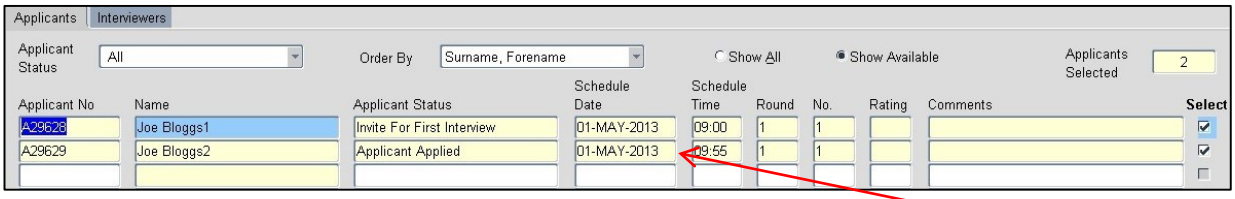
Click on **Applicants** tab

For applicants that you want to assign to the interview schedule, click into the **Select** box on the far right column. e.g. **Invite For First Interview** (Once selected, a tick will be visible in the box.)

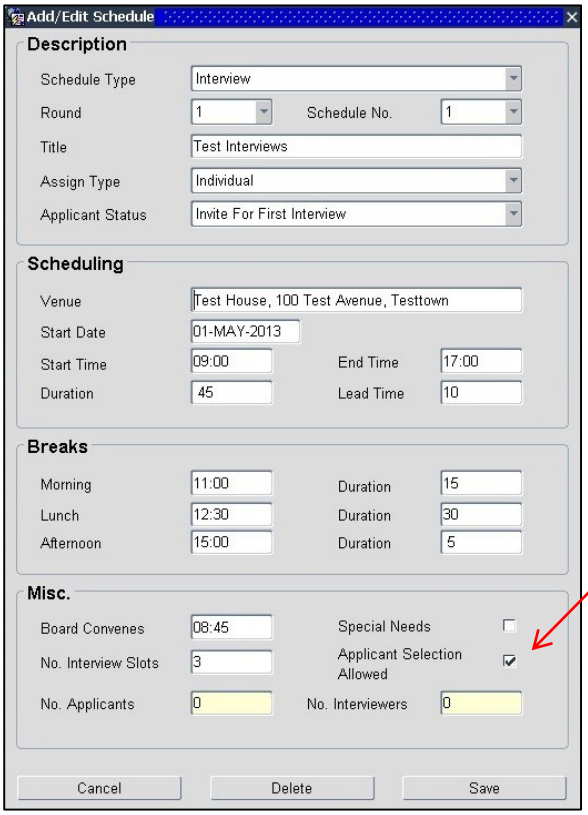
Alternatively, you can click the **Select All** button and then un-tick the ones that are not being assigned to the interview schedule.

If you are assigning interview times, when you have ticks against all the applicants you want to assign to the interview schedule, click the **Assign Interview Times** button.

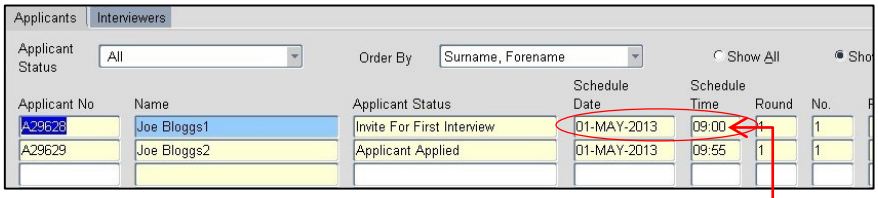
Then click **Save**
Then click **OK**



After you click the **Save** button, your applicants are assigned to the schedule and you can see the dates and times they are scheduled for. On a cautionary note, the system will allow this to happen irrespective of the applicant status (as per above illustration). Therefore, you should ensure the correct applicants are ticked.
In the training session, you are only ticking the **Invite For First Interview** applicants.



When you set up the interview schedule, you ticked the box that allowed Applicants to select their own interview time and day.



If you had left the box un-ticked this would not allow the applicant to update their interview day/ time.

The system will still allocate a slot on the schedule as it needs to have a value in this field. However, if applicants are not in the right order, you can manually update the time for each interview.

For example if you have interviews scheduled at 9:00, 10:00 and 11:00, you can swap the 10:00 with the 11:00 by clicking in the **Schedule Time** field, manually changing the time by typing into the field.

How to edit an interview schedule

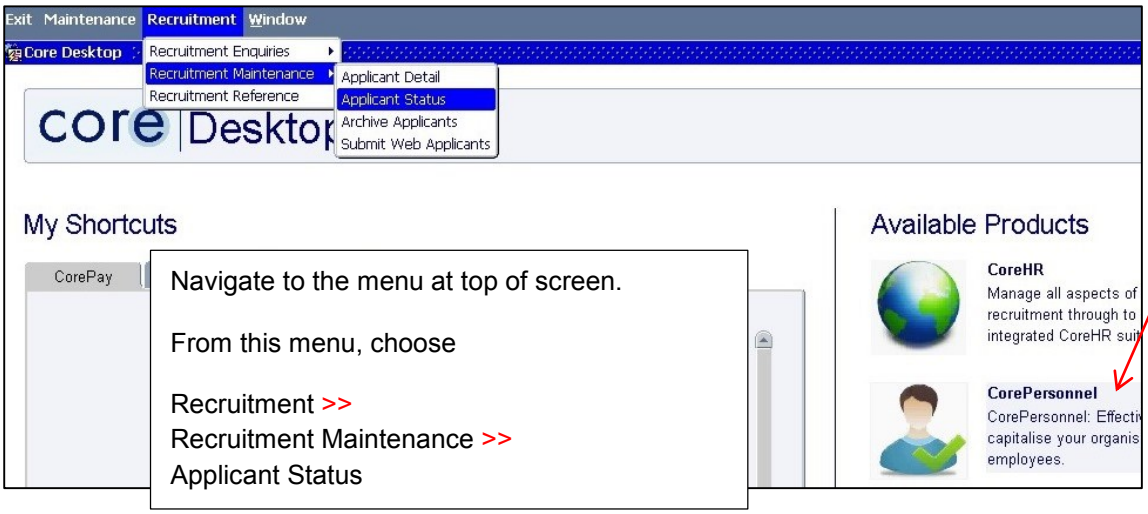
Before an interview schedule can be edited, interview/shortlisting panel members and applicants who have previously been assigned to the schedule need to be unassigned temporarily.

After you have edited the interview schedule and saved the changes, you need to assign your interview/shortlisting panel members and applicants to the interview schedule.

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

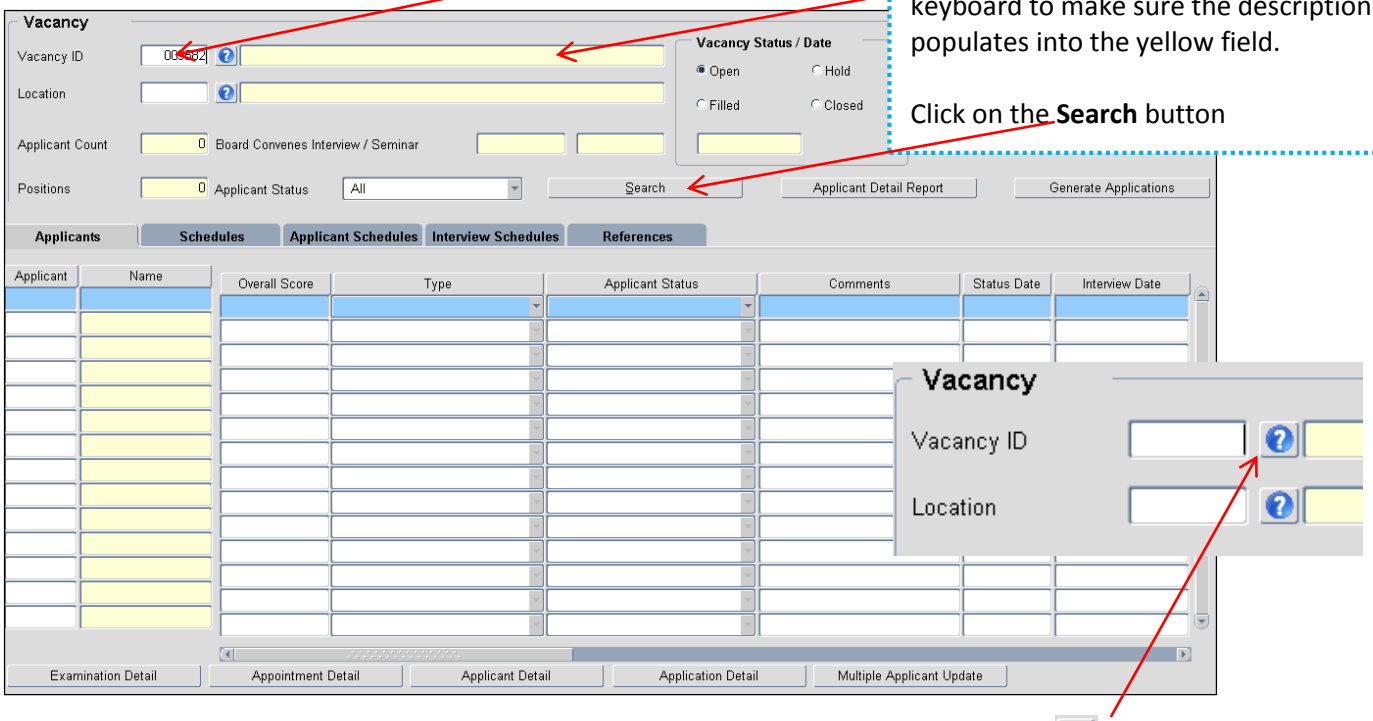
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

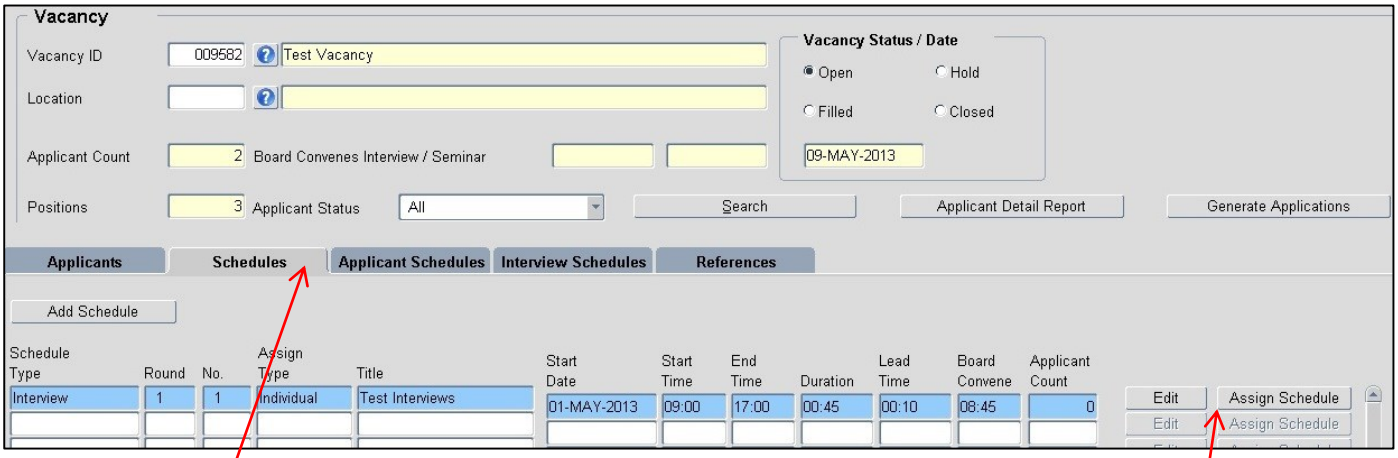
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button



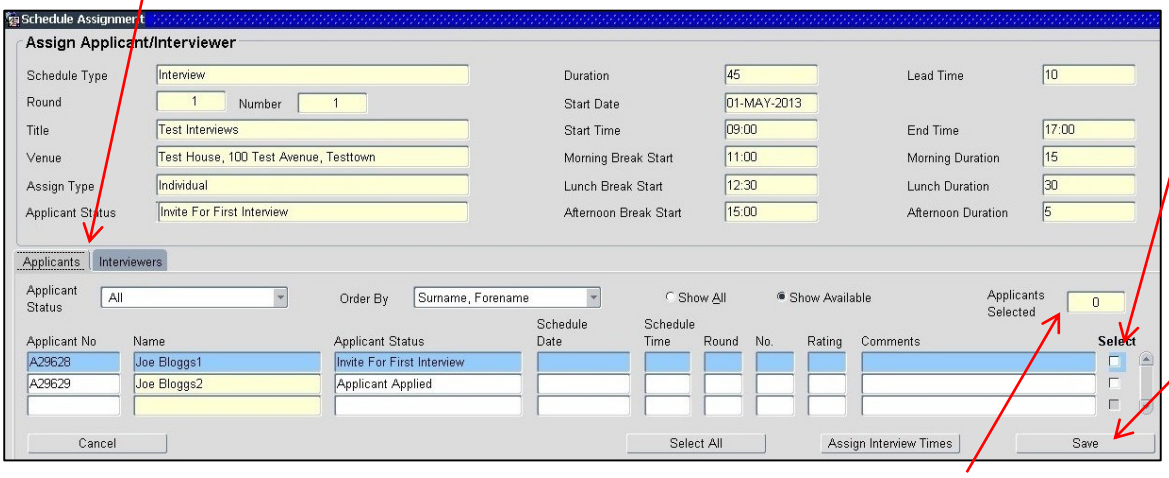
Alternatively, you can also search by the description of your vacancy, by clicking on the button.



Click on **Schedules** tab

Click on the **Assign Schedule** button

To un-assign the Applicants,
click on the **Applicant** tab

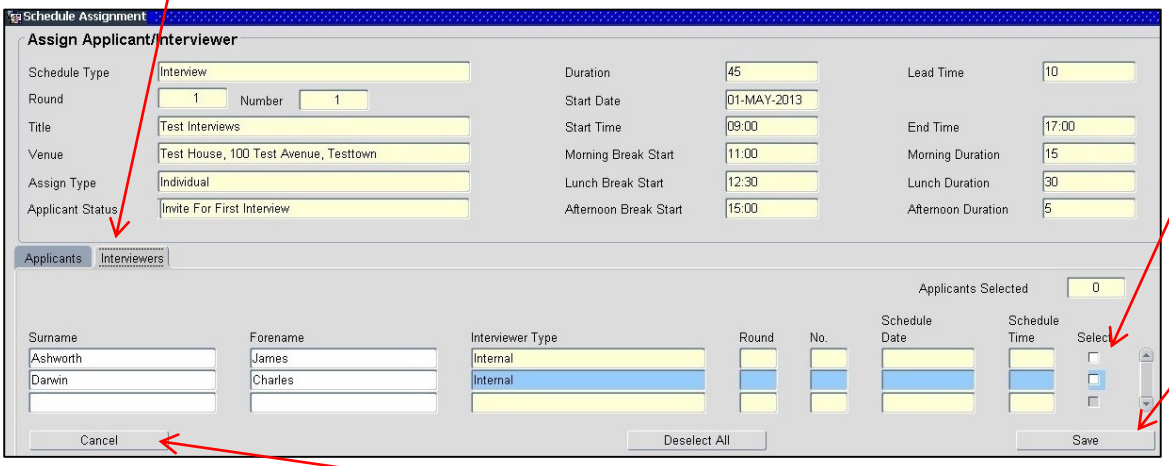


Un-tick the **Select** box for each applicant (click into box to tick or un-tick)

Then click the **Save** button
Then click **OK** button

You can confirm all the applicants have been un-assigned when the **Applicants Selected** box is showing 0

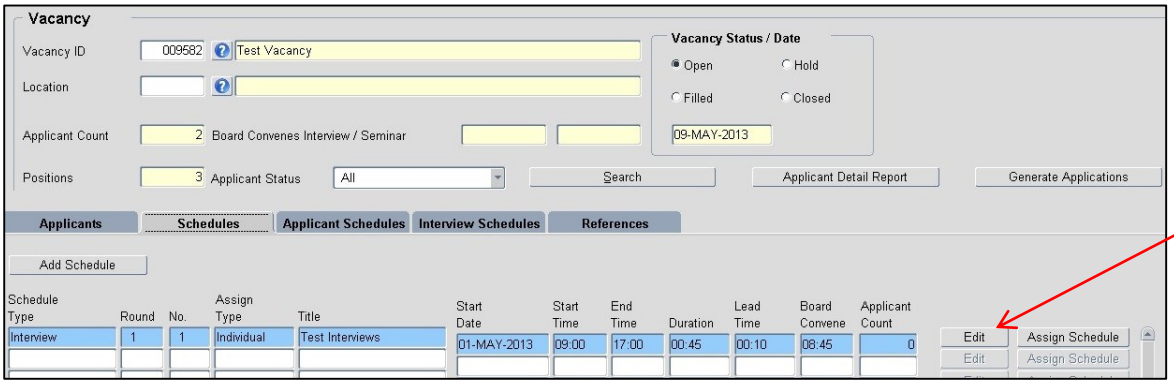
To un-assign the Interview panel members,
click on the **Interviewers** tab



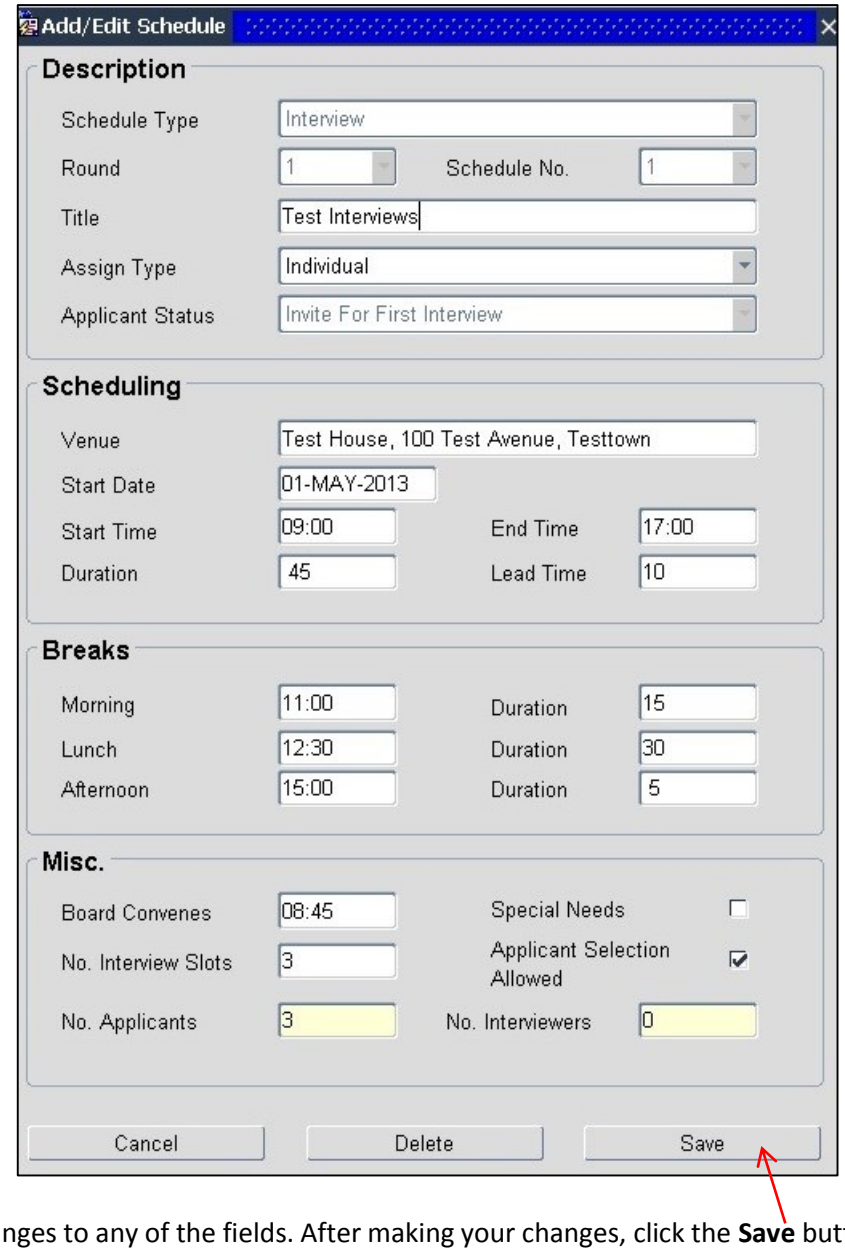
Un-tick the **Select** box for each applicant (click into box to tick or un-tick)

Then click the **Save** button
Then click **OK** button

To exit out of this screen, click on the **Cancel** button. After clicking Cancel, you are returned to the screen below



Click on the **Edit** button



You can now make changes to any of the fields. After making your changes, click the **Save** button.

NB: If you un-assigned any applicants or interview panel members, you will need to assign them to the interview schedule.

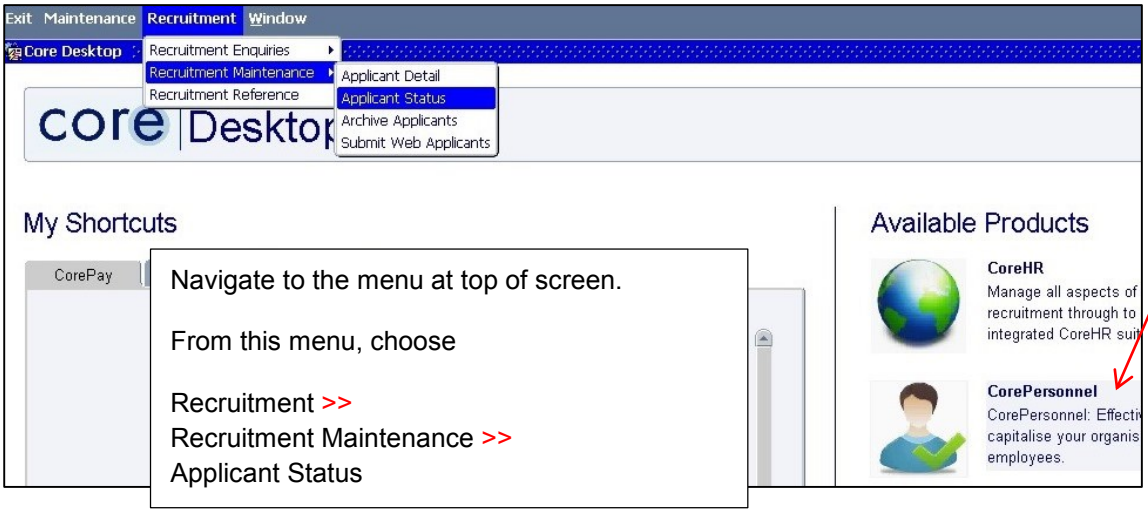
How to delete an interview schedule

Before an interview schedule can be deleted, interview/shortlisting panel members and applicants who have previously been assigned to the schedule need to be unassigned.

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

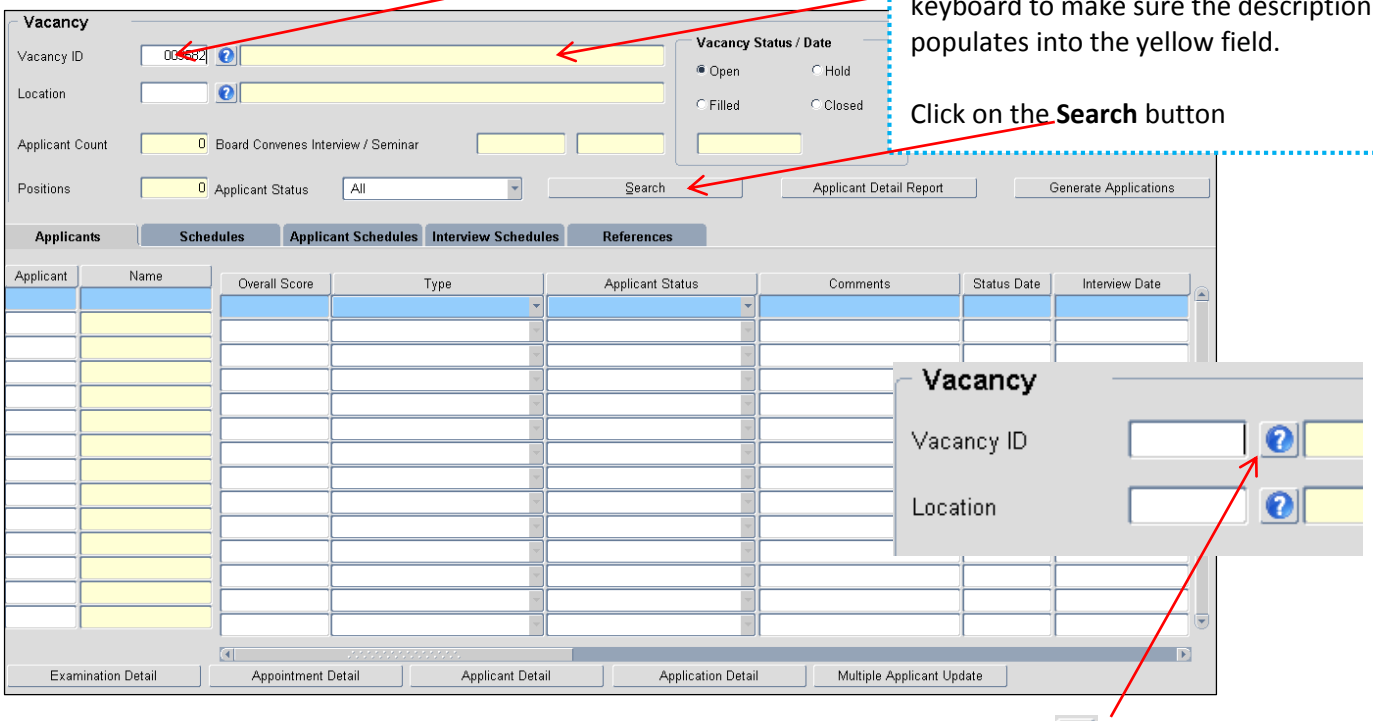
From within the eRecruitment back office, click on Core Personnel



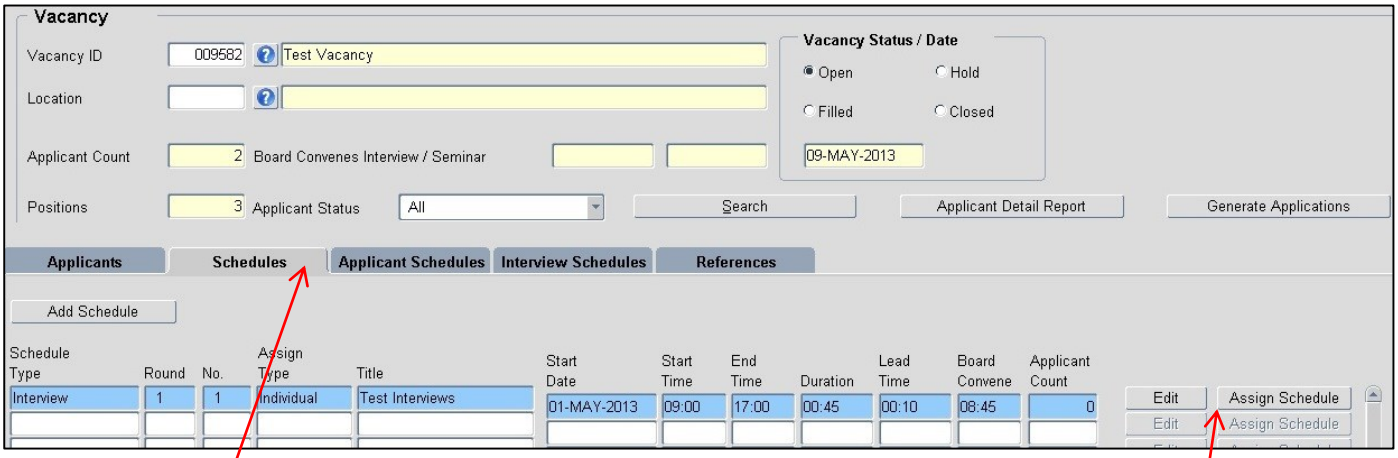
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button



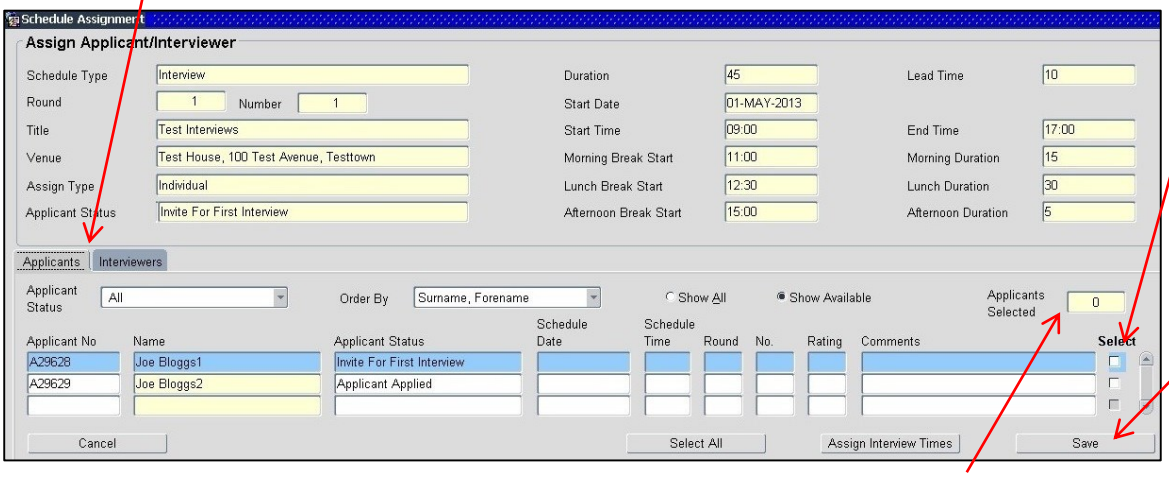
Alternatively, you can also search by the description of your vacancy, by clicking on the button.



Click on **Schedules** tab

Click on the **Assign Schedule** button

To un-assign the Applicants,
click on the **Applicant** tab

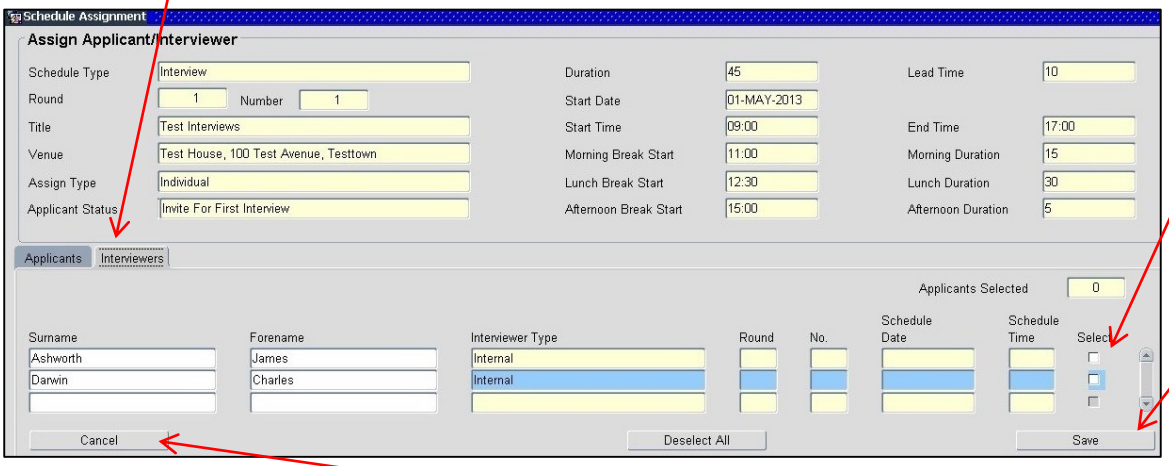


Un-tick the **Select** box for each applicant (click into box to tick or un-tick)

Then click the **Save** button
Then click **OK** button

You can confirm all the applicants have been un-assigned when the **Applicants Selected** box is showing 0

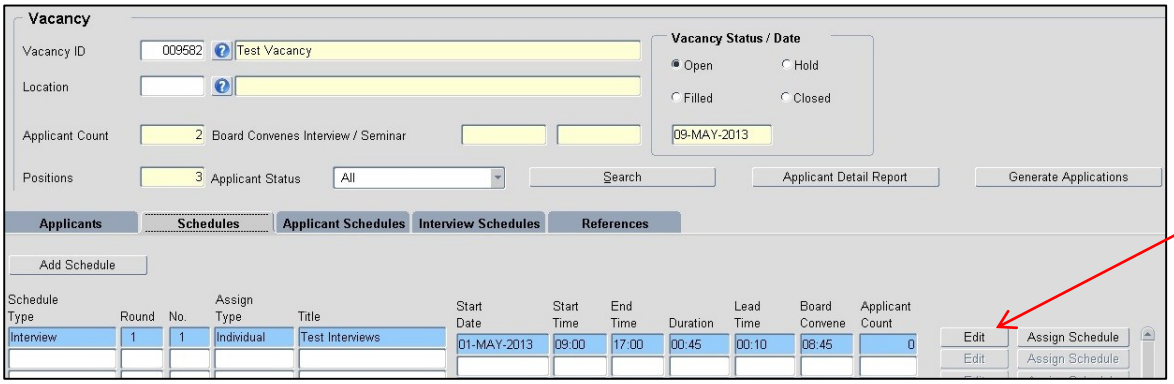
To un-assign the Interview panel members,
click on the **Interviewers** tab



Un-tick the **Select** box for each applicant (click into box to tick or un-tick)

Then click the **Save** button
Then click **OK** button

To exit out of this screen, click on the **Cancel** button. After clicking Cancel, you are returned to the screen below



Click on the **Edit** button

Add/Edit Schedule

Description

Schedule Type: Interview
Round: 1 Schedule No.: 1
Title: Test Interviews
Assign Type: Individual
Applicant Status: Invite For First Interview

Scheduling

Venue: Test House, 100 Test Avenue, Testtown
Start Date: 01-MAY-2013
Start Time: 09:00 End Time: 17:00
Duration: 45 Lead Time: 10

Breaks

Morning: 11:00 Duration: 15
Lunch: 12:30 Duration: 30
Afternoon: 15:00 Duration: 5

Misc.

Board Convenes: 08:45 Special Needs: ☐
No. Interview Slots: 3 Applicant Selection Allowed: ☑
No. Applicants: 3 No. Interviewers: 0

Cancel | Delete | Save

Click on the **Delete** button to delete the Interview Schedule.

A warning message will appear. If you are certain you want to delete the schedule, click on the **Yes** button

CorePersonnel 16.2.1 Test

This schedule has been assigned to applicants/interviewers. Deleting it will remove their details also. Do you want to continue?

Yes | No

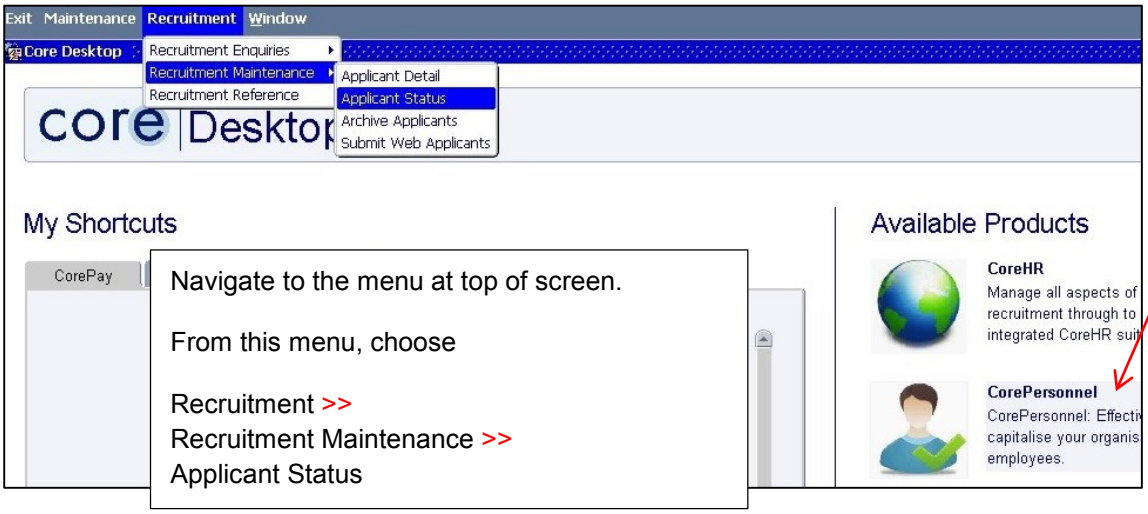
How to save the CV and other documents which are attached to an application

If you only want to print out one candidate application or if the merge applications into a PDF document is not working, you can individually print candidate applications.

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

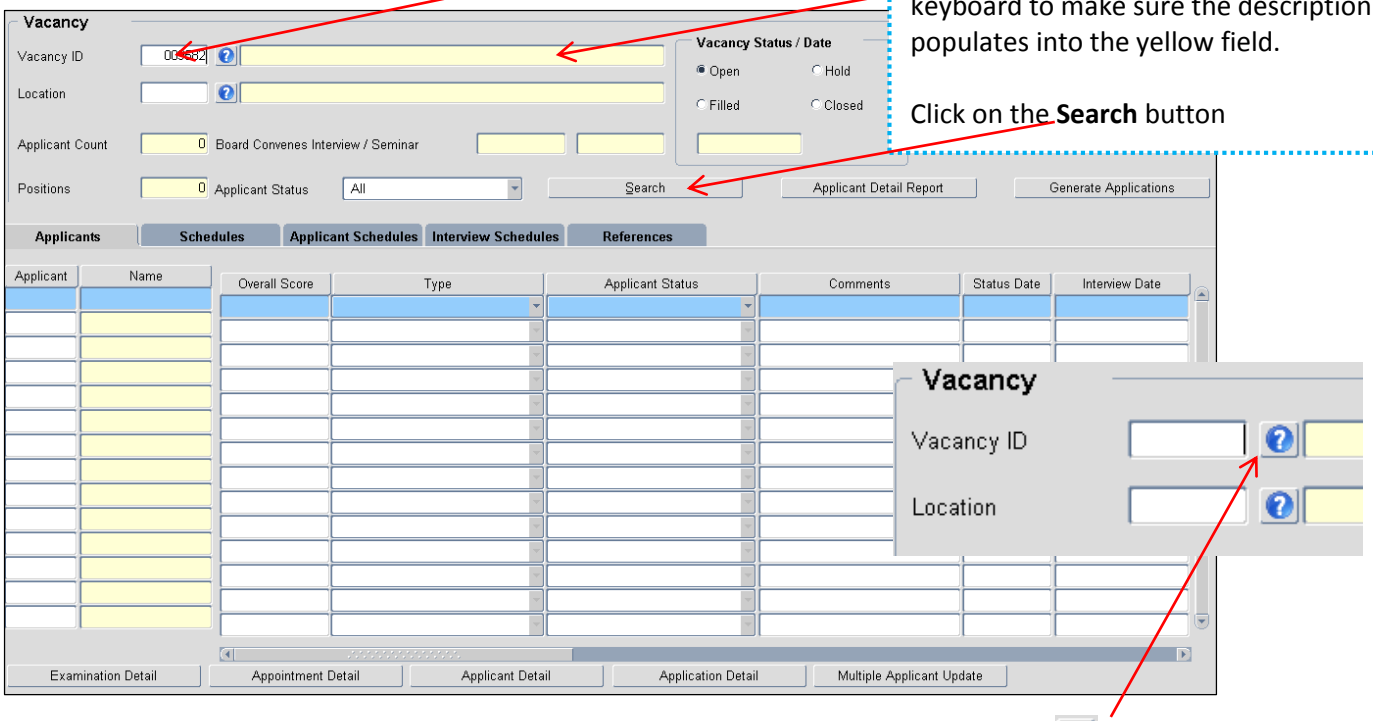
From within the eRecruitment back office, click on Core Personnel



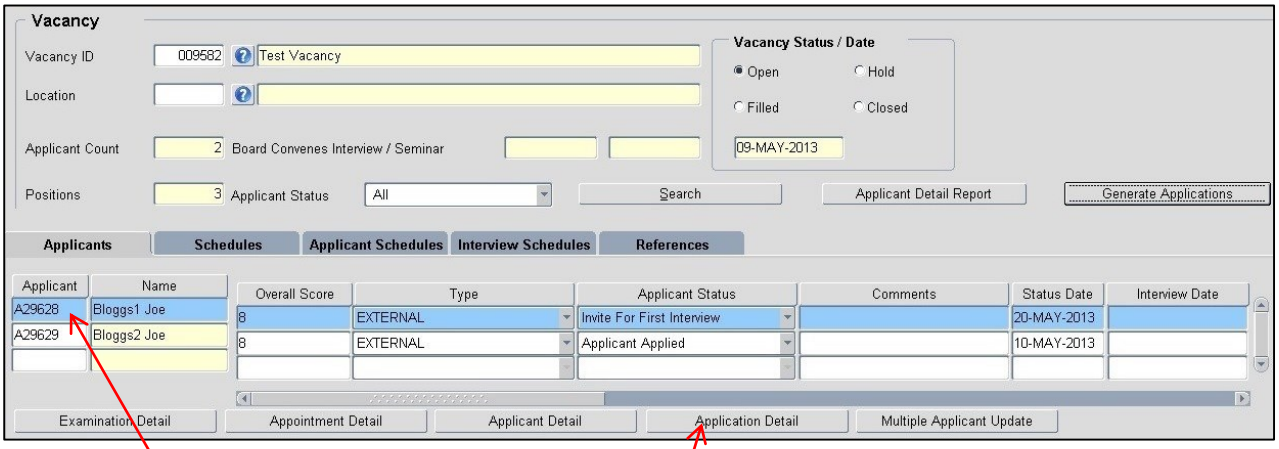
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button



Alternatively, you can also search by the description of your vacancy, by clicking on the button.



Highlight your applicant

Click on **Application Detail** button

This will open the application form in a new window. You can copy and paste the content to a word document and then save as PDF format.
Within the application form window, scroll down to the Applicant Documents section.
You can then save the applicant's documents (e.g. CV) to your PC.

How to combine all applications for your vacancy into one document

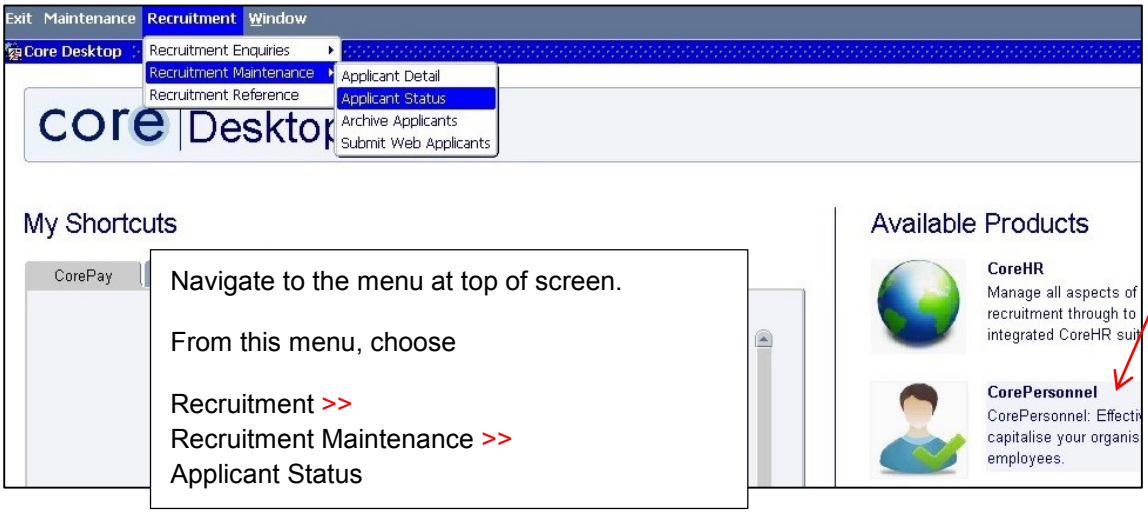
The software will allow you to combine all of the applications linked to your vacancy into one document.

This is also known as using the PDF generator or generating a PDF file.

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

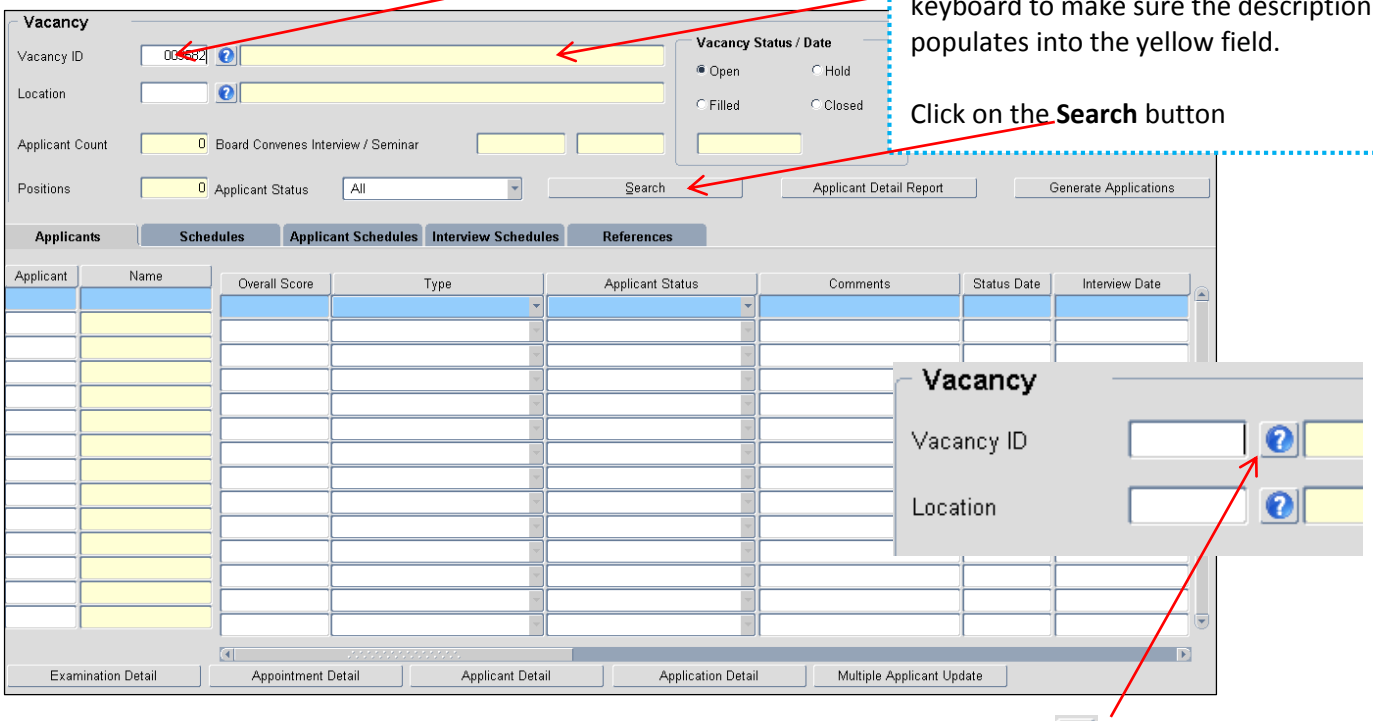
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

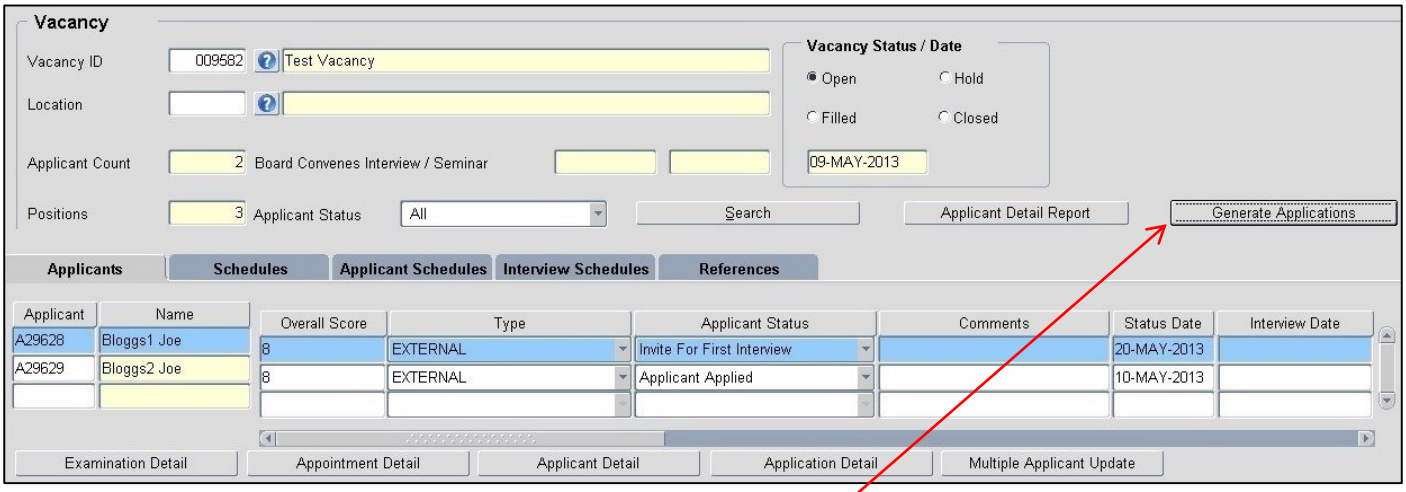
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

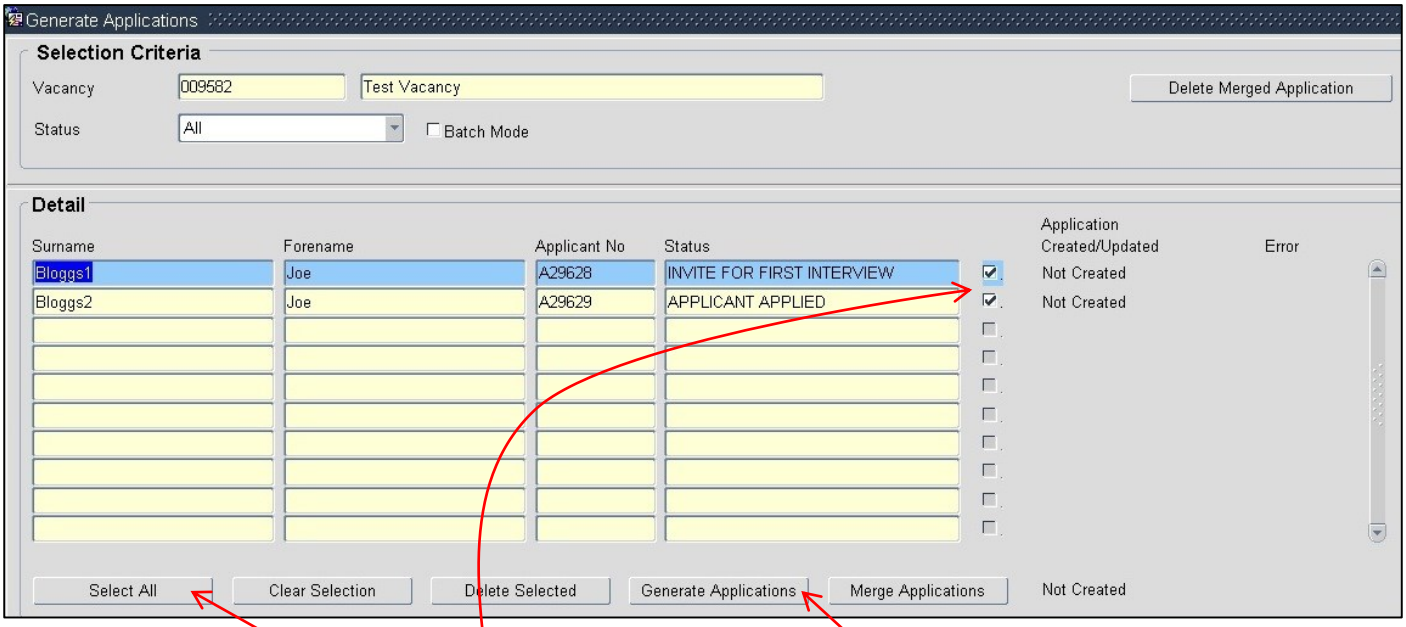
Click on the **Search** button



Alternatively, you can also search by the description of your vacancy, by clicking on the button.

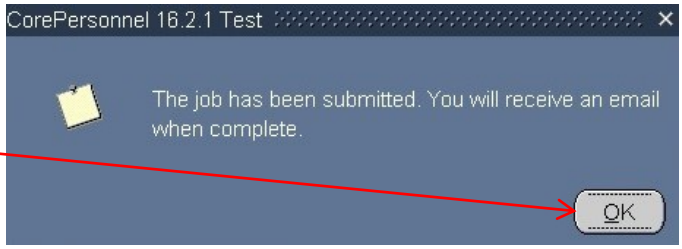


Click on **Generate Applications** button



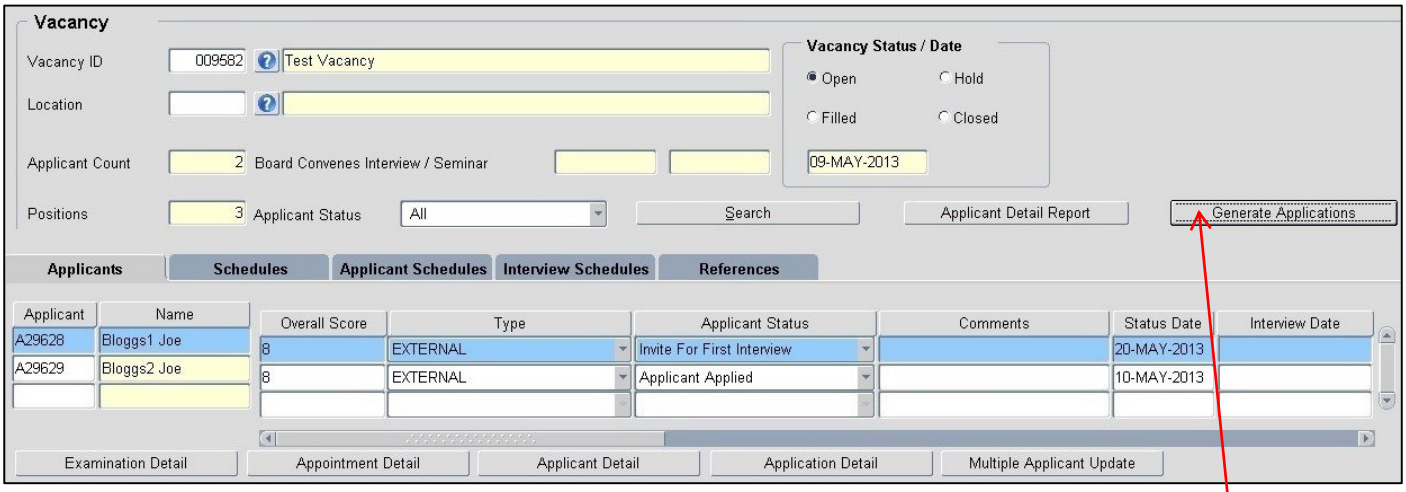
You can either select all applications by clicking the **Select All** button or you can **select individual applications** by clicking in the box to the right of the application to generate a PDF document. Clicking in the box will tick or un-tick.

After you have selected your applications, click on the **Generate Applications** button.



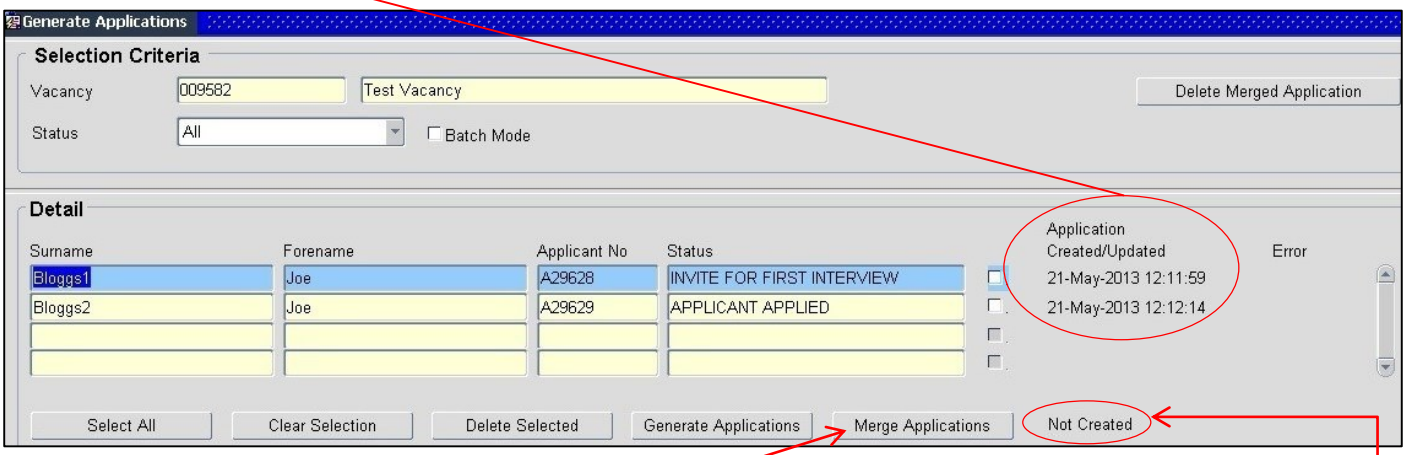
To confirm, click on the **OK** button.
You will also receive a confirmation email.

After you click the **OK** button, you will then see the screen below.



You need to go back into the Generate Applications screen, so click on **Generate Applications** button

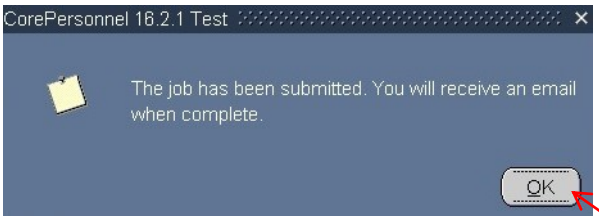
You can now see the applications that you generated on the previous step have been recorded in the system with a date and time stamp. If you click on an individual date and time stamp, it will open the application.



You can combine all your applications into one document by clicking on the **Merge Applications** button.

Before doing this, make sure the tick box is checked for your applications.

You can tell if your applications have already been merged into one document when a date and time stamp is visible next to the Merge Applications button.
In this case, we can see it hasn't happened yet.

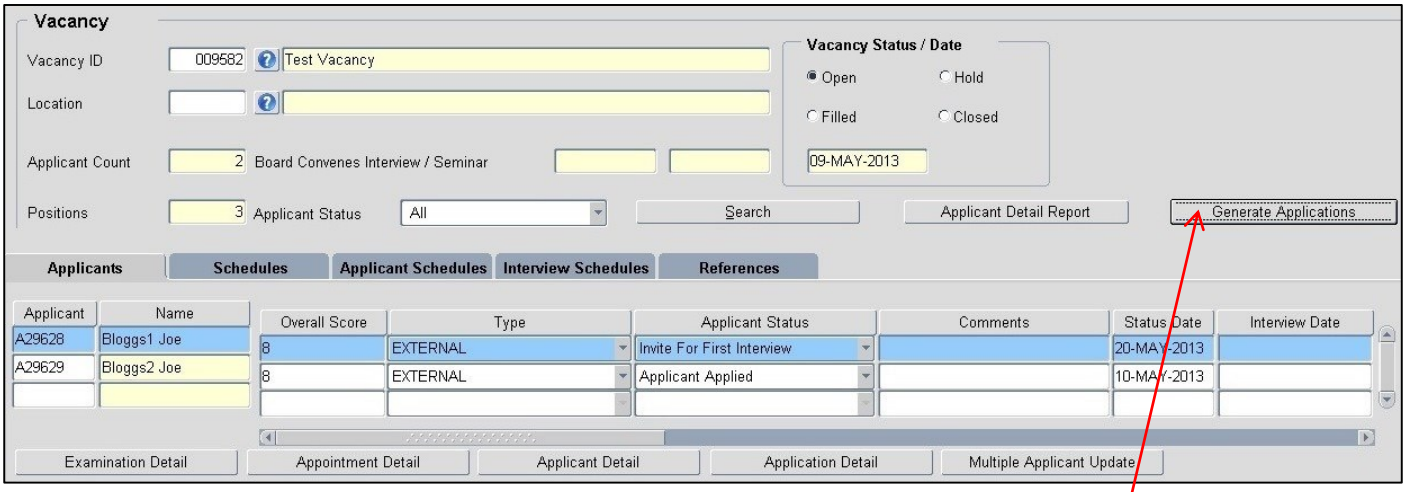


You will see a message to advise you will receive an email when the Merge is complete.

NB: It can take up to 15 minutes for the Merge to complete depending on the amount of applications you have

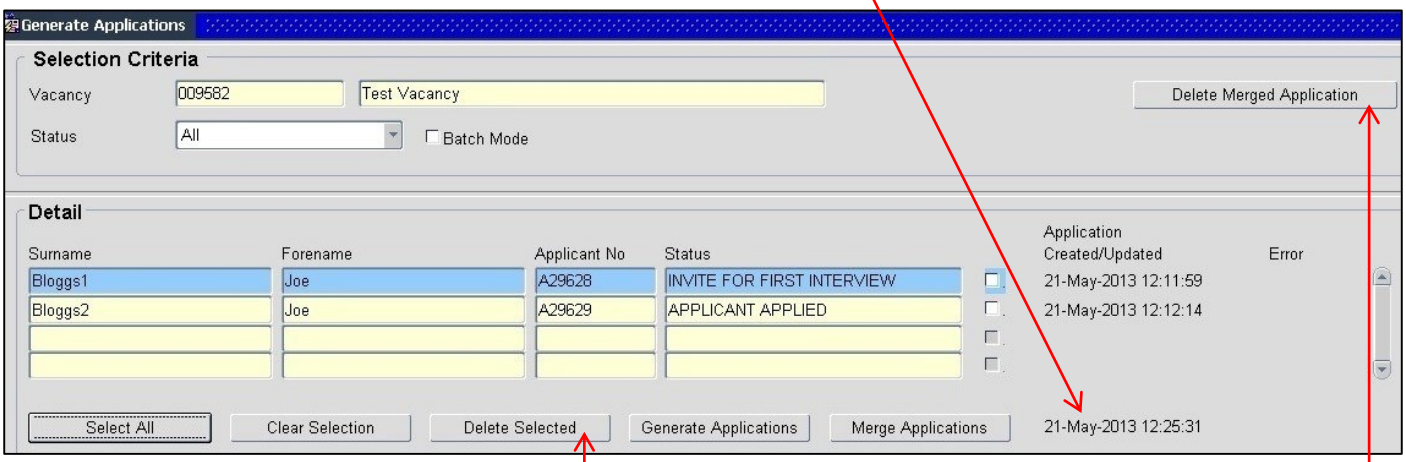
To confirm, click on the **OK** button.

You will then see the screen below.



You need to go back into the Generate Applications screen, so click on **Generate Applications** button

When you have received the email to inform you the merge is complete, you will then be able to see the date and time stamp next to the Merge Applications button. Click on this date/ time stamp to open up the single document that includes all your applications.



This document is in Adobe PDF format.

You can save it to your PC and print as you would normally do with other PDF's

You can delete selected applications by clicking on the **Delete Selected** button.

If you want to create a new single document with a different selection of applications, you need to click the **Delete Merged Application** button. This will remove any stored documents and allow to you start again.

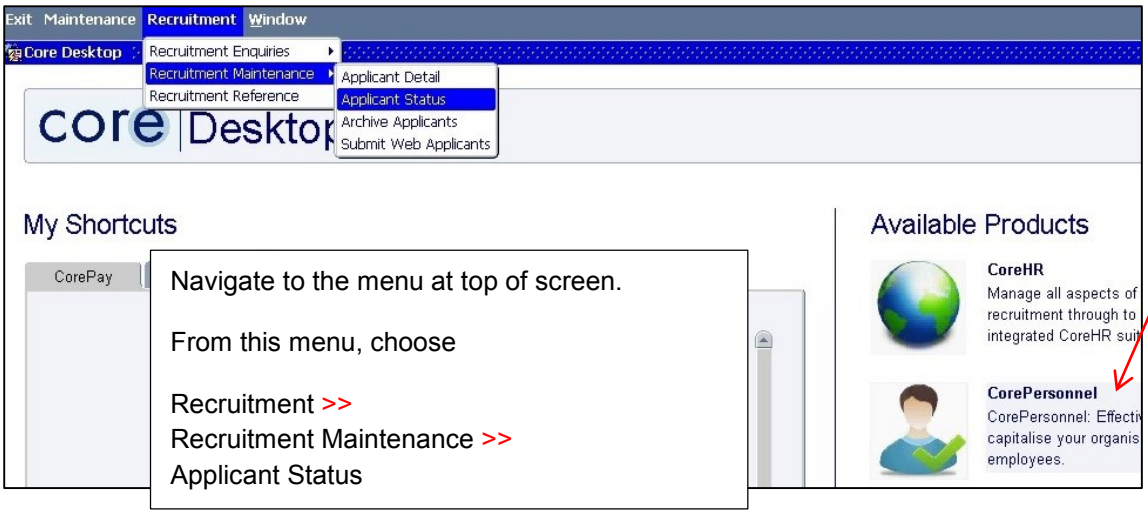
To leave this screen, click on the X at the top right hand corner of the Generate Applications window.

How to change applicant statuses within Back Office

To access your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

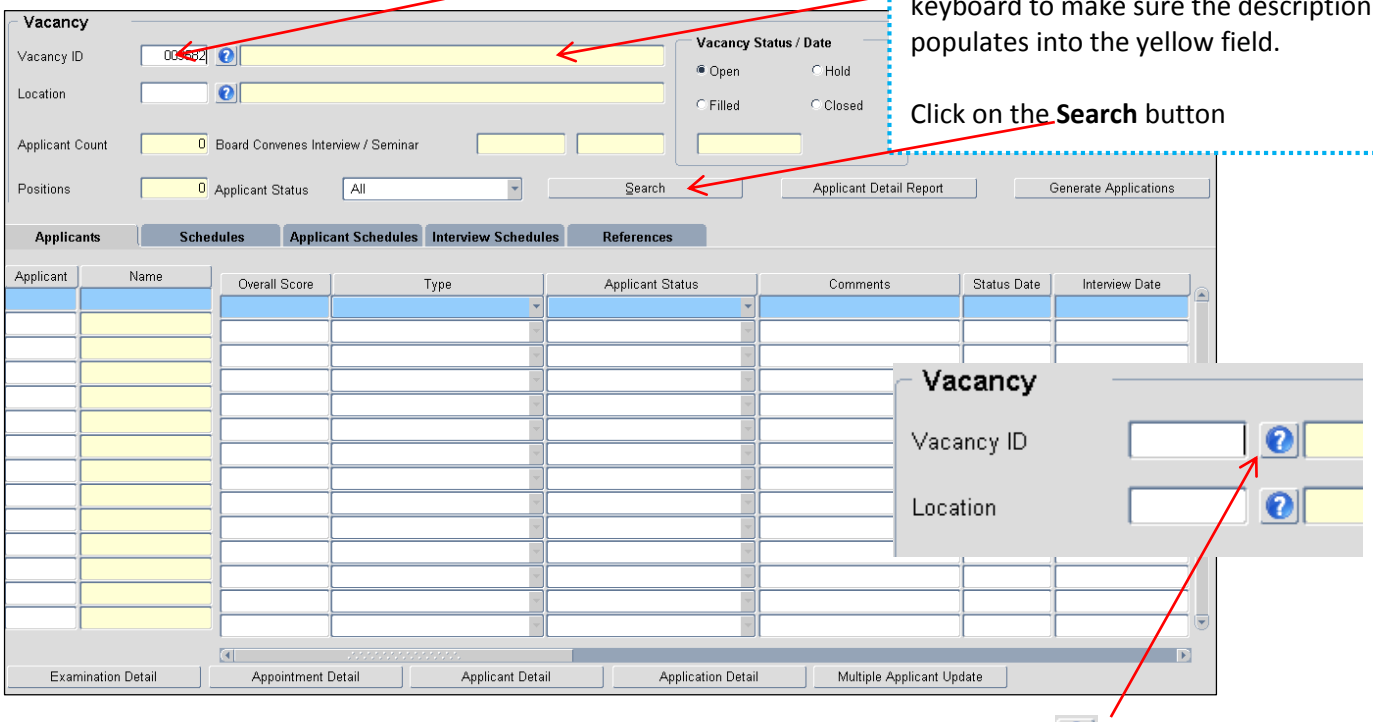
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

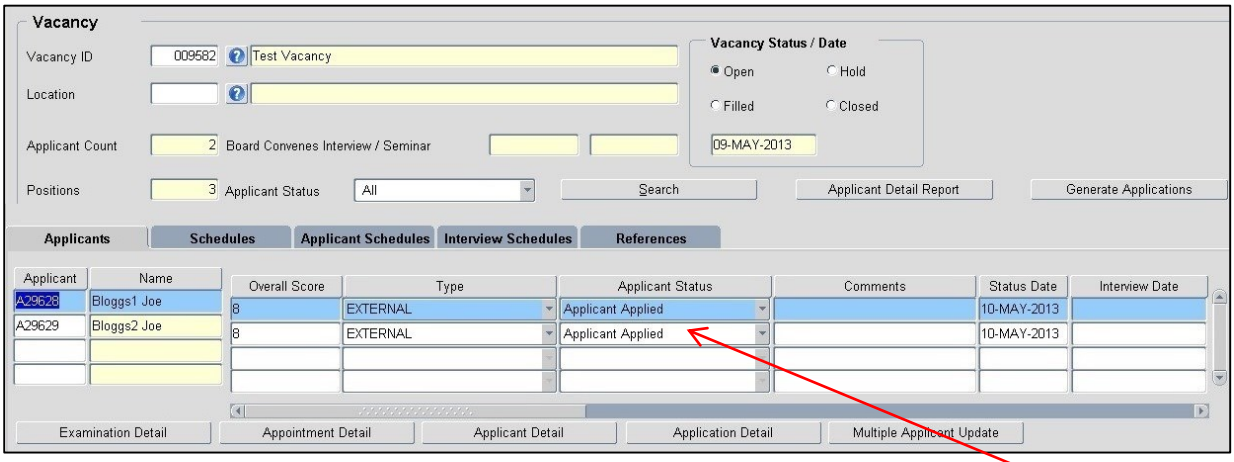
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button

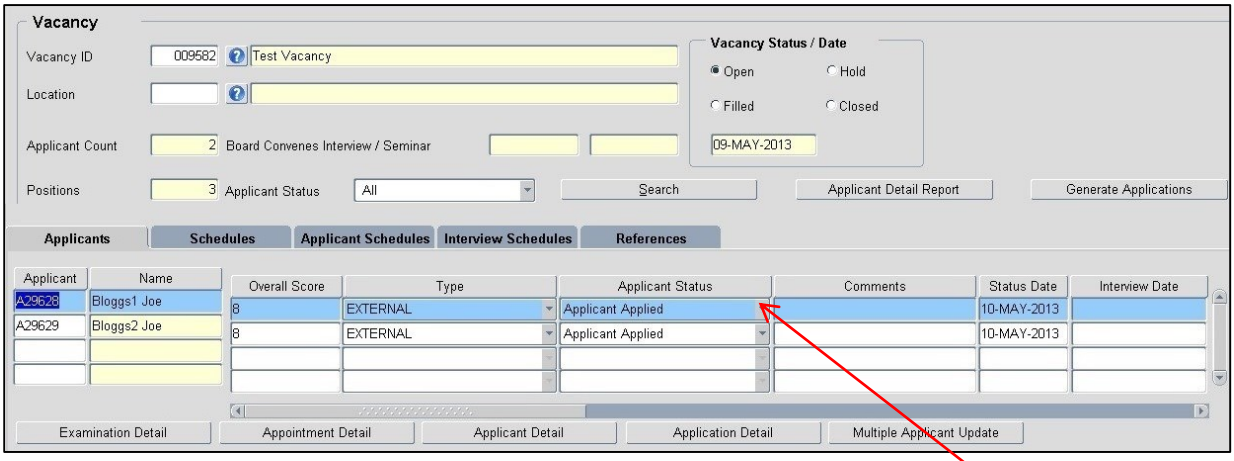


Alternatively, you can also search by the description of your vacancy, by clicking on the button.



When an applicant applies for a vacancy, their status is set to **Applicant Applied** by default.

You will need to update applicant statuses as appropriate throughout the recruitment process.
Updating applicant statuses is, in effect, completing applicant tracking details.
Further information on applicant tracking is available at:
http://www.ed.ac.uk/schools-departments/human-resources/recruitment/recruitment-guide/shortlisting/applicant-tracking



To change the status of an applicant, click on the arrow to the right of the **Applicant Status** field and select the appropriate option from the list.

Samples of the options available to the Recruiter are:

Status	Description	When to use
Applicant Offered	Applicant being offered the post	When ready to complete the Appointment details for the successful applicant
Application Withdrawn	Applicant has chosen to withdraw their application	When an applicant requests to have their application withdrawn
Before Offer Check	Before Offer Check to be carried out to check whether the applicant is a: • New Start • Casual Member of Staff • Current or Current and Ex-Employee • Ex-Employee	When a decision has been made to offer an applicant the post, before the offer is made This check must be undertaken (and the outcome confirmed by HR) before the post can be offered to an applicant
Declined Offer	Applicant has been offered post but has declined	When the applicant has declined the offer
Failure to Attend Interview	Applicant was invited to attend interview but did not show up	When the applicant has failed to attend interview
Invite for First Interview	Applicant has been invited to attend a first round interview	When it has been decided who to invite for the first stage of interviews
Invite for Second Interview	Applicant has been invited to attend a second round interview	When it has been decided who to invite for the second stage of interviews
Rai – Experience Adequate But Not Best	Reject after interview - Applicant's experience is adequate but not as experienced as successful applicant	When the outcome of the interviews has been decided
Rai - Experience Below Minimum Required	Reject after interview - Applicant's experience does not meet minimum requirements for the role	When the outcome of the interviews has been decided

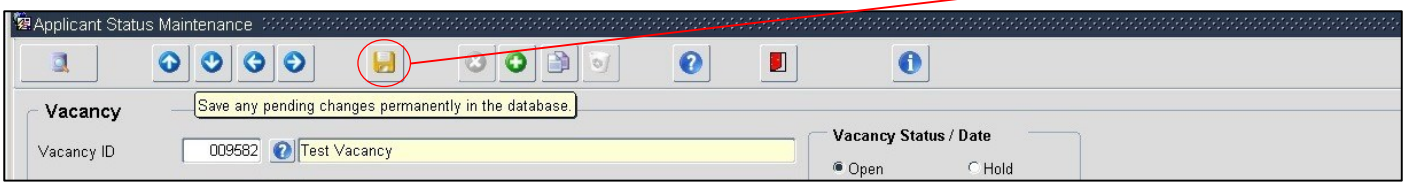
Status	Description	When to use
Rai – Quals Adequate But Not Best	Reject after interview - Applicant's qualifications are adequate but not as qualified as successful applicant	When the outcome of the interviews has been decided
Rai – Quals Below Minimum Required	Reject after interview - Applicant's qualifications do not meet minimum requirements for the role	When the outcome of the interviews has been decided
Rbi – Application Inadequate	Application is inadequate	When shortlisting has taken place and it has been decided who to invite to interview
Rbi – Experience Adequate But Not Best	Reject before interview - Applicant's experience is adequate but not as experienced as shortlisted applicant(s)	When shortlisting has taken place and it has been decided who to invite to interview
Rbi – Experience Below Minimum Required	Reject before interview - Applicant's experience does not meet minimum requirements for the role	When shortlisting has taken place and it has been decided who to invite to interview
Rbi – Quals Adequate But Not Best	Reject before interview - Applicant's qualifications are adequate but not as qualified as shortlisted applicant(s)	When shortlisting has taken place and it has been decided who to invite to interview
Rbi - Quals Below Minimum Required	Reject before interview - Applicant's qualifications do not meet minimum requirements for the role	When shortlisting has taken place and it has been decided who to invite to interview
References Requested	References are being requested for the applicant	When at the stage of contacting referees, to request references
Reserve	It has been decided to keep the applicant as a reserve until it has been confirmed whether or not another applicant has accepted the job offer, for example	As required

You will notice there are more options available on the dropdown list which are not included in the sample above. These options may be more applicable to HR and less frequently used by the Recruiter.

NB: Before you offer a post to an applicant, you must change that applicant's status to Before Offer Check

Before HR can produce a contract, you must have updated all applicant statuses from Applicant Applied, to whichever status is most appropriate for each applicant.

After you have changed a status for the applicant, remember to save the change by clicking on the **Save** icon



How to notify an applicant from the system via email

The eRecruitment software has the functionality to email applicants from within the system.

Some examples of emails available to use are:

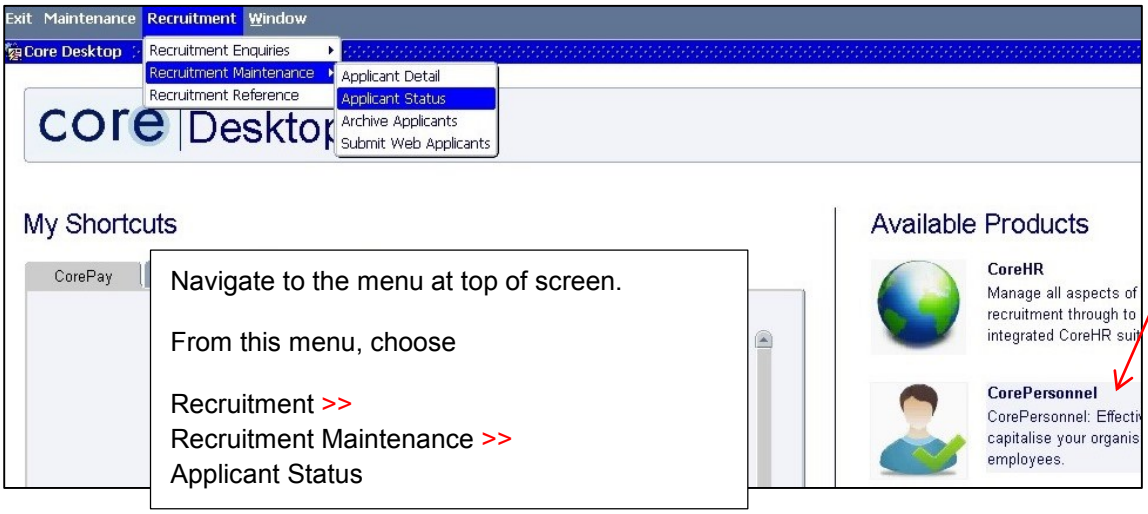
- **Invite to Interview** - inviting applicant to interview
- **Regret Not Shortlisted** - notify applicant they have not been shortlisted for vacancy
- **Regret After Interview** - notify applicant they have been unsuccessful following interview
- **Post Withdrawn** - notify applicant the post they applied to has been withdrawn
- **Withdraw Conditional Offer** - notify applicant their conditional offer has been withdrawn

Typically, after an applicant status has been changed, email notifications can be sent.

To access the email facility for your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

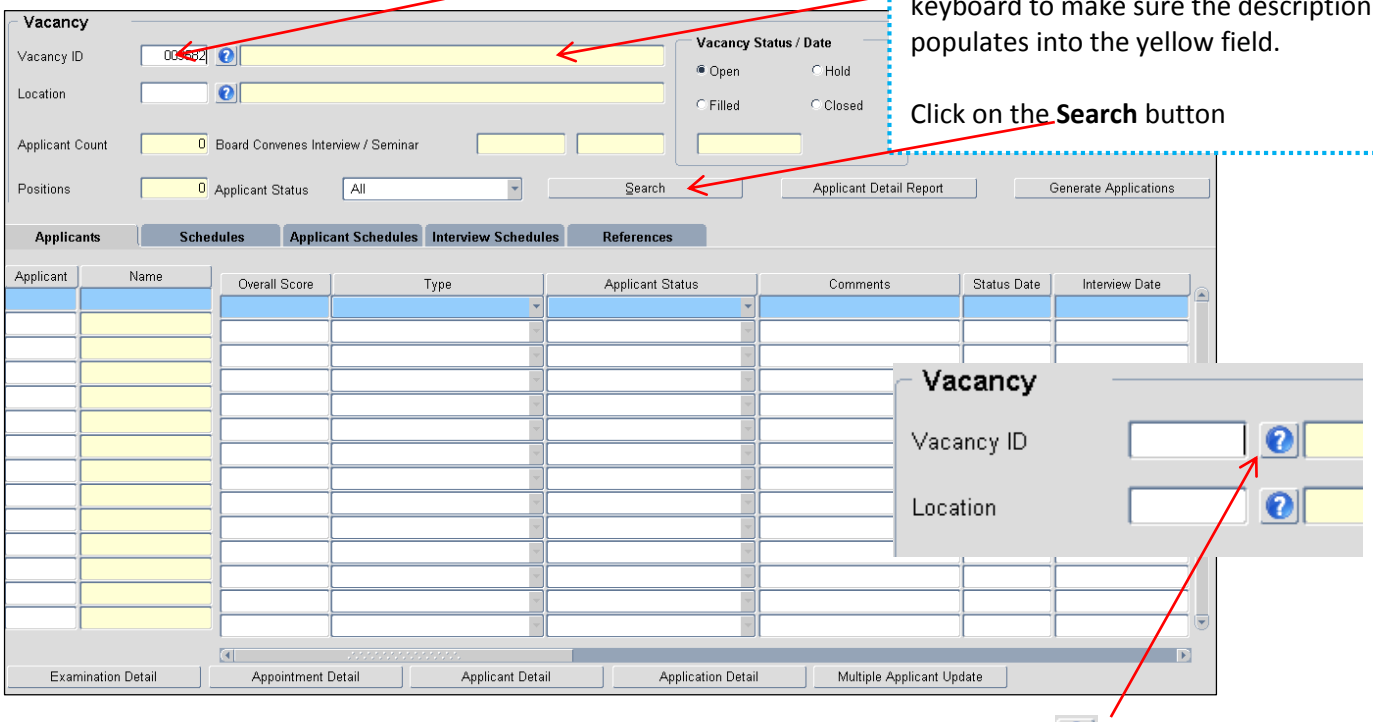
From within the eRecruitment back office, click on Core Personnel



Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

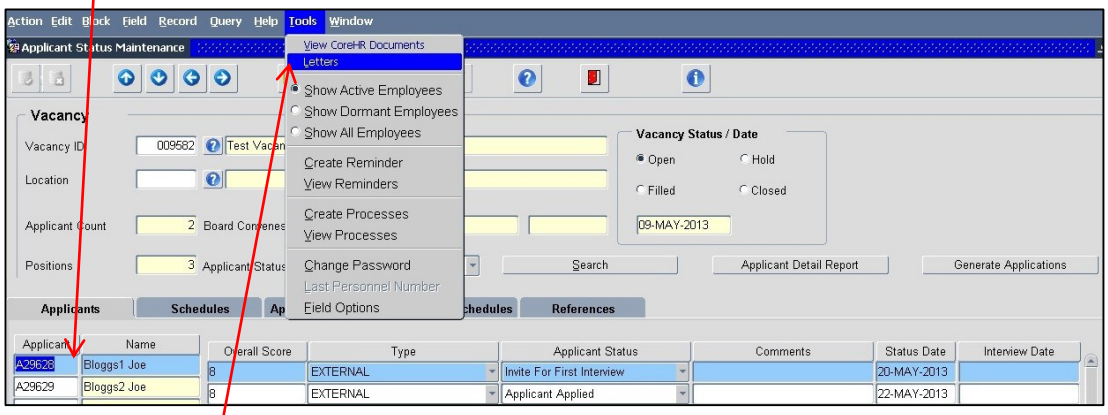
Click on the **Search** button



Alternatively, you can also search by the description of your vacancy, by clicking on the button.

You can choose to email one applicant individually or many applicants simultaneously. When emailing many applicants simultaneously, the email is tailored to each individual and will not contain details of other applicants.

If you are emailing one applicant individually, make sure your desired recipient is highlighted in your list of applicants. You can see **A29628 Joe Bloggs1** is highlighted in the screenshot below.



After your applicant is selected, click on **Tools >> Letters** from the menu at the top of the window.

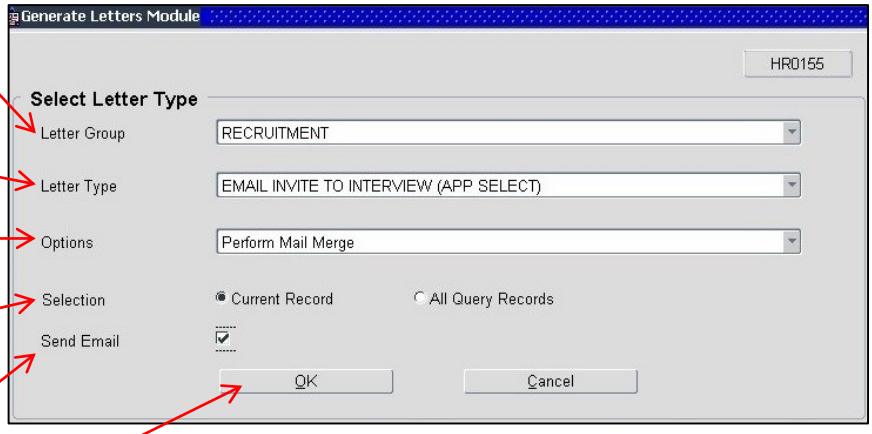
Letter Group - choose Recruitment

Letter Type - choose the one that is applicable to you. In this example, we are inviting Joe Bloggs1 to interview

Options - choose Perform Mail Merge

Selection - make sure Current Record is selected

Send Email - make sure box is ticked



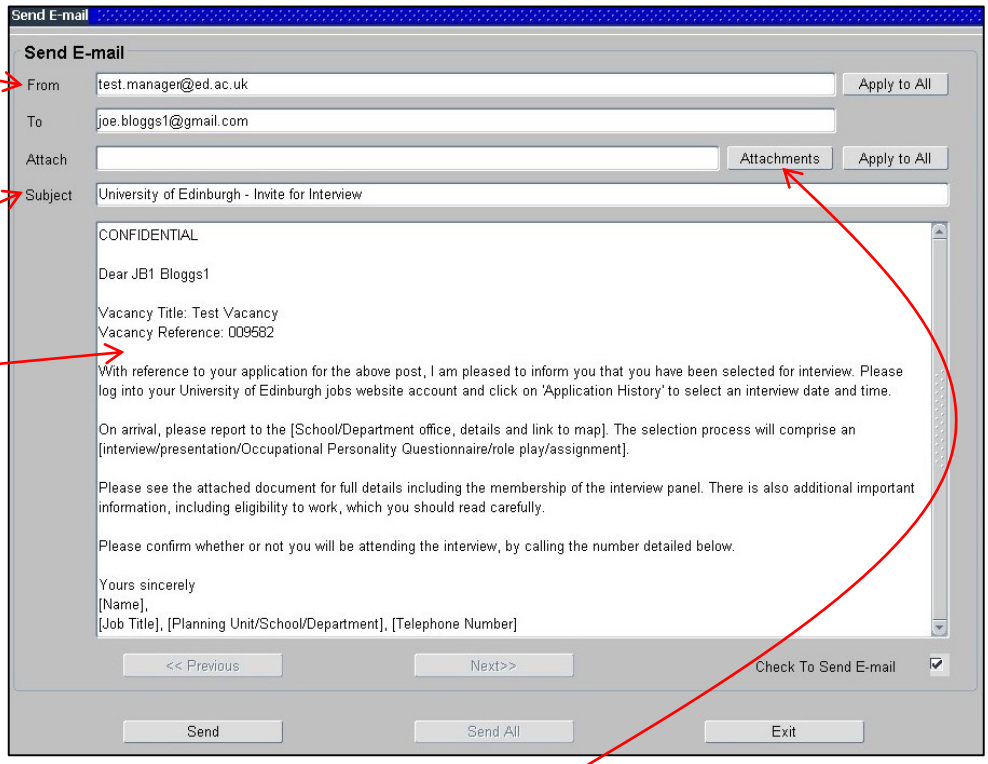
After clicking the **OK** button, the Send E-mail screen will appear.

From: Type your email address, or the email address of another appropriate staff member.

Subject: Edit as required

Main Body: Edit as required. Default text is provided and you can change this to suit. You do need to edit the main body and remove any of the [brackets and examples]

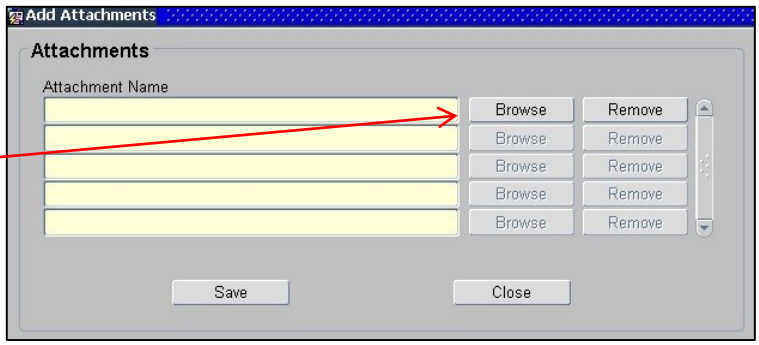
NB:
The character limit is 2000



You can attach a document to your email, by clicking on the **Attachments** button.

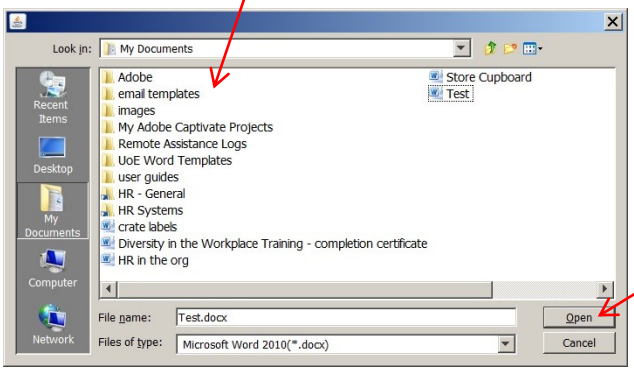
This is particularly relevant for the Invite to Interview email.
As the main body of the email has a 2000 character limit, it is good practice to attach an **Invite to Interview letter**.
A template is available for this letter, which can be edited to suit your circumstances and is located at:
http://www.docs.csg.ed.ac.uk/HumanResources/Recruitment/invite_interview.doc

After you have clicked on the Attachments button, the Add Attachments window will appear.



To attach the document from your computer, click on the **Browse** button.

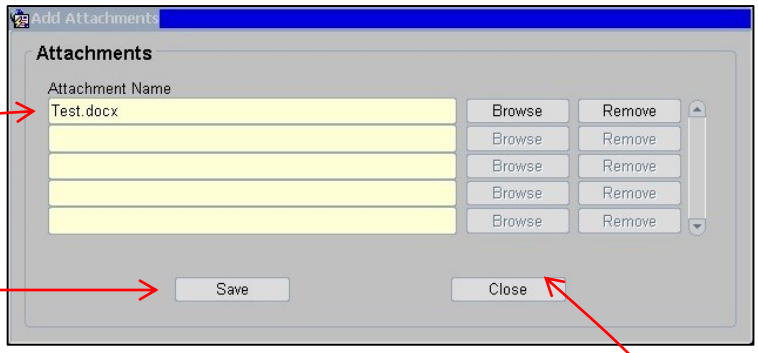
This will open up a window to allow you to select your document. It may open your My Documents folder by default.

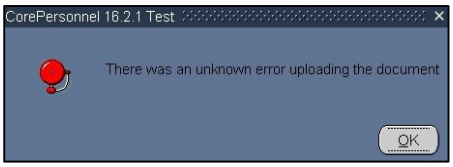


Once you have selected your document, click on the **Open** button

The Add Attachments window will appear again and you can see your document in the yellow **Attachment Name** field

Then click on the **Save** button

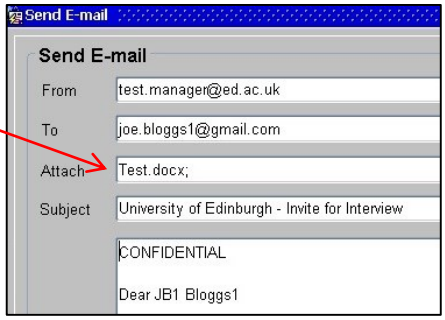




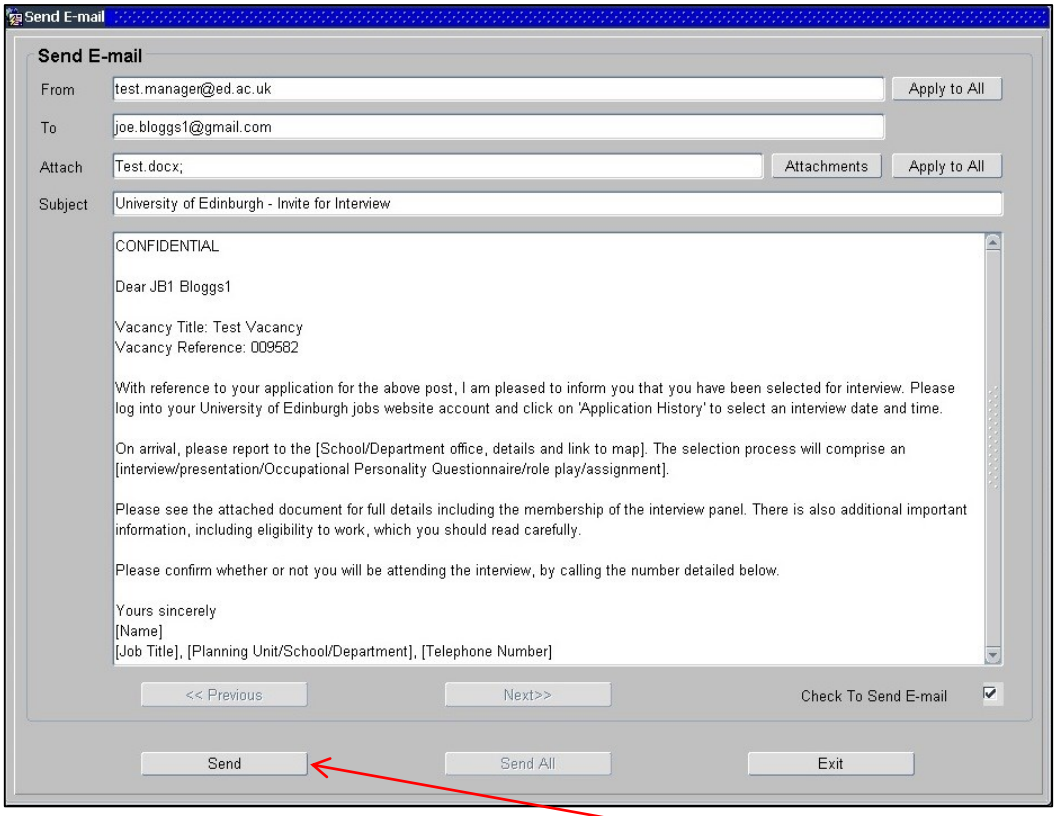
You will then see two message windows.
Click **OK** to both, then click on the **Close** button

You are then returned to your Send E-mail window

You can now see your attachment.



You are not able to remove an attachment from the Send E-mail window. You have to go back into the Add Attachment window and click the Remove button, then the Save button.



After you have checked that all details within the email are correct, click on the **Send** button.

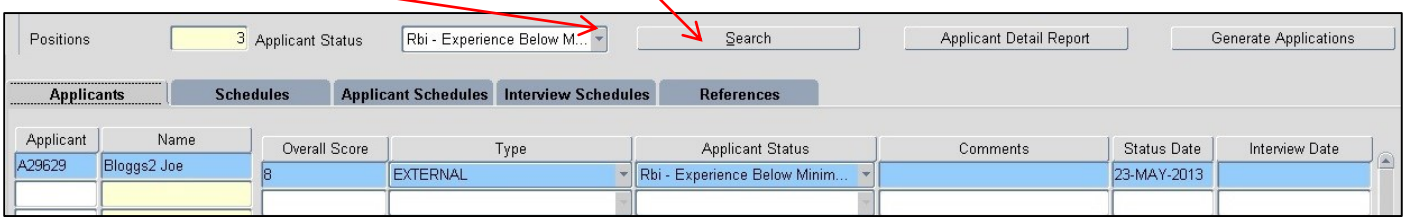
A confirmation message will appear. Click the OK button.

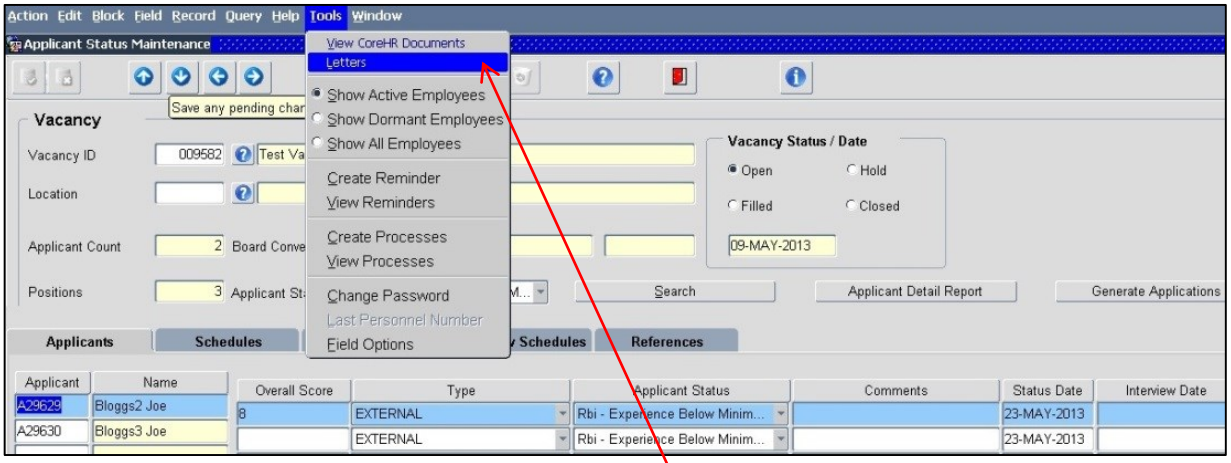
When emailing many applicants simultaneously, the email is tailored to each individual and will not contain details of other applicants. It is good practice to sort the applicants by their applicant status, in the first instance.

This ensures greater reliability, knowing the whole of your target audience is being captured.

For example, if you have a lot of candidates who have an application status of:
Rbi – Experience below minimum required, then you can sort them by their status and send an email to only those applicants with that status.

NB: select the **Applicant Status**, then click on **Search** button





After you have sorted applicants by their status, click on **Tools >> Letters** from the menu at the top of the window.

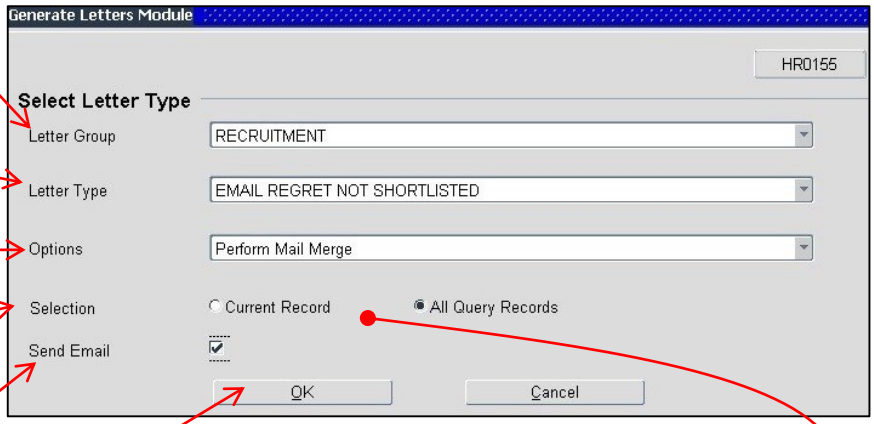
Letter Group - choose Recruitment

Letter Type - choose the one that is applicable to you. In this example, we are regretting unsuccessful apps.

Options - choose Perform Mail Merge

Selection - make sure All Query Records is selected

Send Email - make sure box is ticked

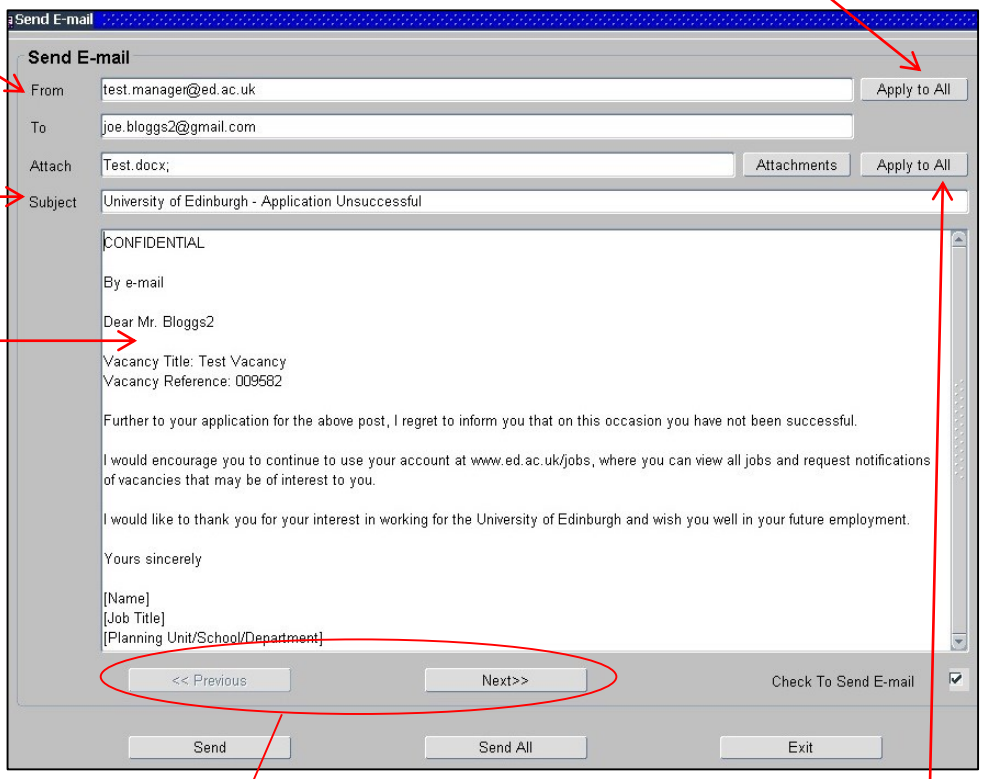


After clicking the **OK** button, the Send E-mail screen will appear.

Within Select Letter Type, the main difference between single emails and group emails is the **Selection** field
When doing a single recipient, choose Current Record
When choosing multiple recipients, choose All Query Records

From: Type your email address, or the email address of another appropriate staff member.

You need to also click on the **Apply to All** button to make sure all recipients see this.



Subject: Edit as required

Main Body: Edit as required. Default text is provided and you can change this to suit. You do need to edit the main body and remove any of the [brackets and examples]

NB:
The character limit is 2000

You can attach a document the same way as when you email a single recipient.

However, if you want all recipients to receive the attachment, you need to click on the **Apply to All** button

If you do not want all the recipients to receive the attachment, you would need to individually attach the document to each recipient. You can do this by using the **Next** and **Previous** buttons to scroll between the email recipients.

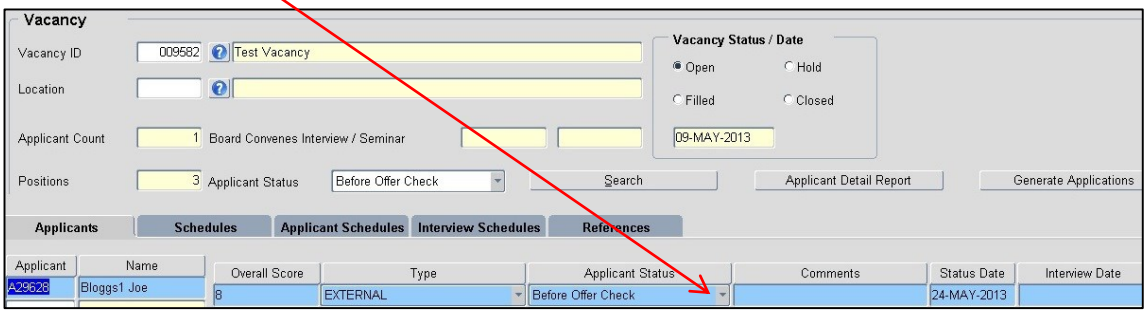
It is good practice to review each email to make sure the content and other details are correct.

When you are happy with this you can send all the emails at the same time by clicking on the **Send All** button.
If you click on the **Send** button, only the email on your screen will be sent and not the other recipients in the group.

How to initiate a Before Offer Check

You have identified the applicant you want to offer the post to. Before an offer is made to an applicant, it is imperative a **Before Offer Check** is conducted to help manage risk of the appointment.

After the successful applicant is identified, the Recruiter will initiate the Before Offer Check by changing the applicant status to Before Offer Check.



When the Applicant Status is changed to Before Offer Check, this will automatically notify your Local HR, by way of a system generated email.

Notification email NOT sent automatically if:

The Before Offer Check notification email will not be sent if the Date of Birth or National Insurance number is missing.

If either the DOB or NI number is not in, the system will not send a notification email. Your Local HR will not be aware you have changed the applicant status to Before Offer Check.

Therefore always make sure that both of these are provided BEFORE changing the status to 'Before Offer Check'

Date of Birth:
The date of birth field is a mandatory field when an applicant makes an online application. Therefore, in normal circumstances the DOB field will always have a value.

However, if the Recruiter links an applicant to a vacancy which has not been advertised, the DOB field will be blank. It is not possible for the Recruiter to update the DOB field in this instance. The Recruiter should email hr.systems@ed.ac.uk or phone 0131 650 8126 and request the DOB to be added to the applicant number (e.g. A12345)

> An example of a vacancy which has not been advertised is when you have two applicants that you want to offer a post to and your staff request only specified one. In this example, you would create a new vacancy and then link the second successful applicant to the new vacancy, meaning the vacancy would not be advertised.

NI number:
The National Insurance number is not a mandatory field as some applicants may not have a NI number For example if someone is new to the UK. The Recruiter would need to check whether the applicant has a NI number before changing the applicant status to Before Offer Check.Only if they definitely do not have one is a temporary one input.

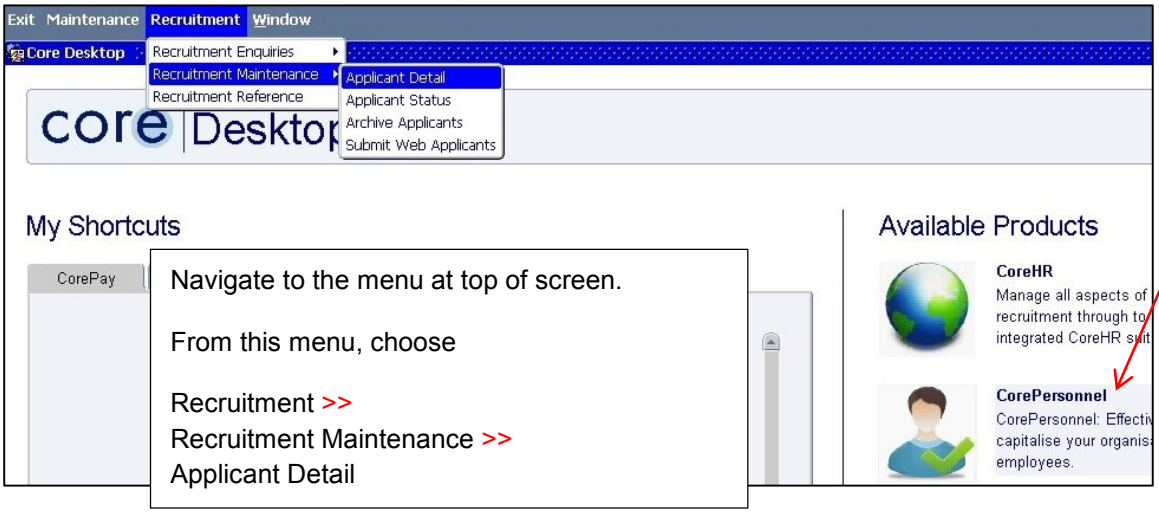
If an applicant does not have an NI number the recruiter should enter one in the following format:
NM date of birth in 6 digit format D (e.g. applicant DOB is 12 May 1980 enter like this NM120580D)

It is possible to enter the NI number in step 2 of 4 in the Appointment Details screen. However, this is not the correct place to enter it and it will not feed into the Oracle HR database, again stalling the process.

The correct way to enter the NI number is in the Applicant Details screen. You get to this screen from the menu Core Personnel >> Recruitment >> Recruitment Maintenance >> Applicant Details

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

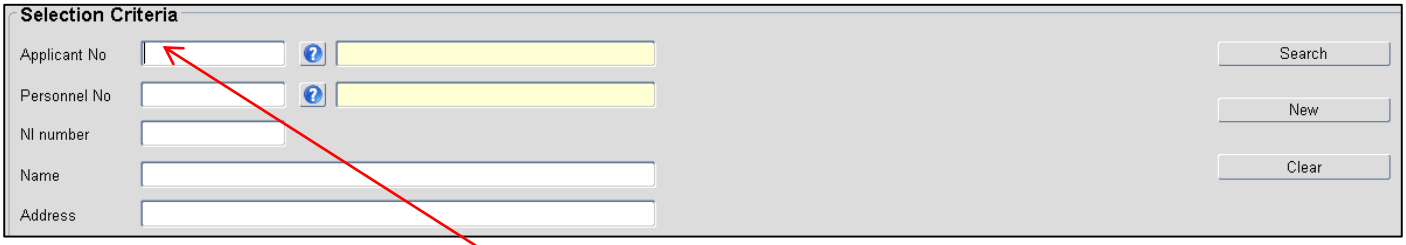
From within the eRecruitment back office, click on Core Personnel



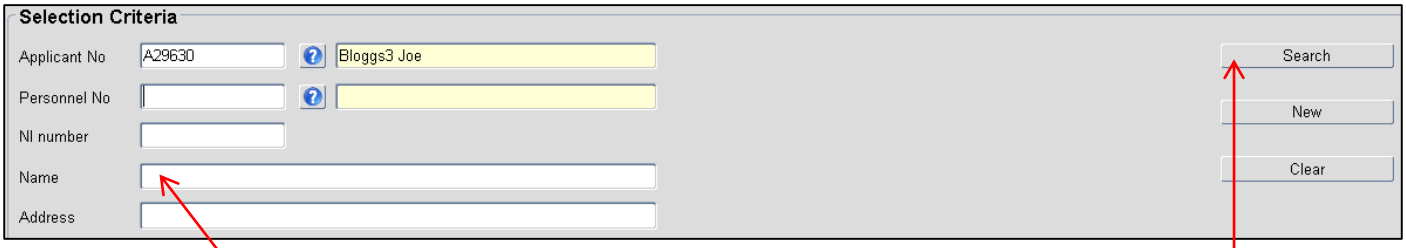
Navigate to the menu at top of screen.

From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Detail

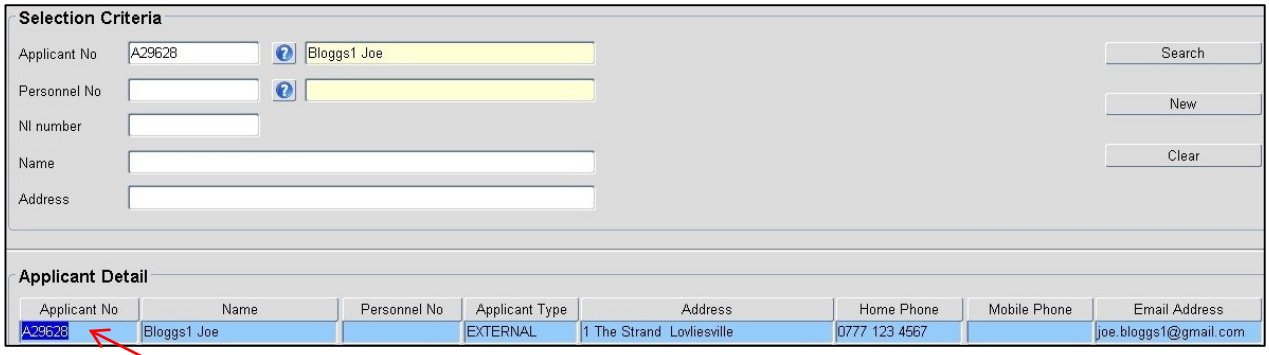


Type the applicant number into the Applicant No field and press Tab or Enter key on your keyboard to activate a search on the applicant number. This will populate the applicant name in the yellow field next to the **Applicant No**



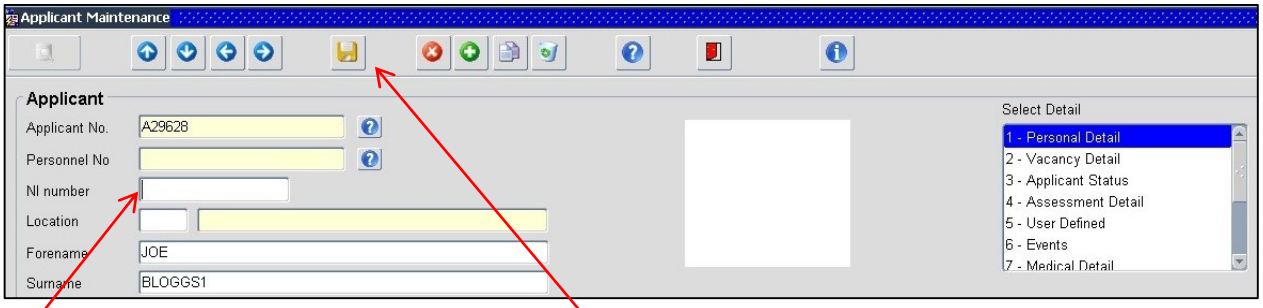
If you are not sure of the applicant number, you can enter all or part of the applicant name in the **Name** field.

You now need to click on the **Search** button, to will show the applicant details.



Double click on the Applicant No.

This will open up the Applicant Maintenance screen

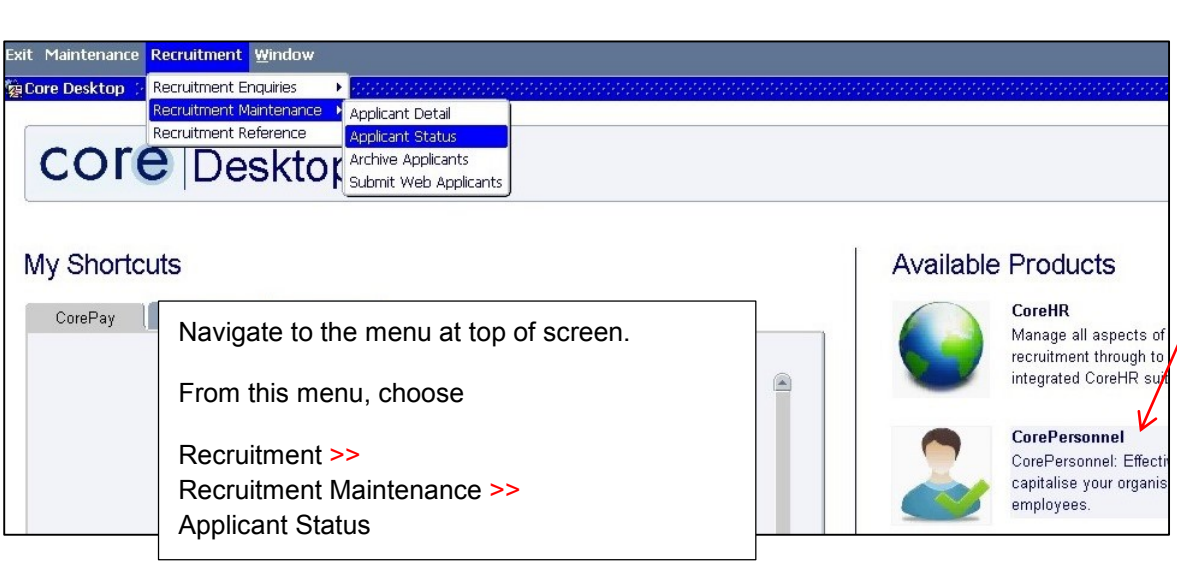


Enter the NI number

Save your action by clicking on yellow floppy disc icon

The Applicant Maintenance screen is where you would check to verify the NI number has been entered.
If there is already a valid NI number visible in this screen and you are sure the date of birth is in the eRecruitment back office, then you can change the status to Before Offer Check.
The access path for this is:

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

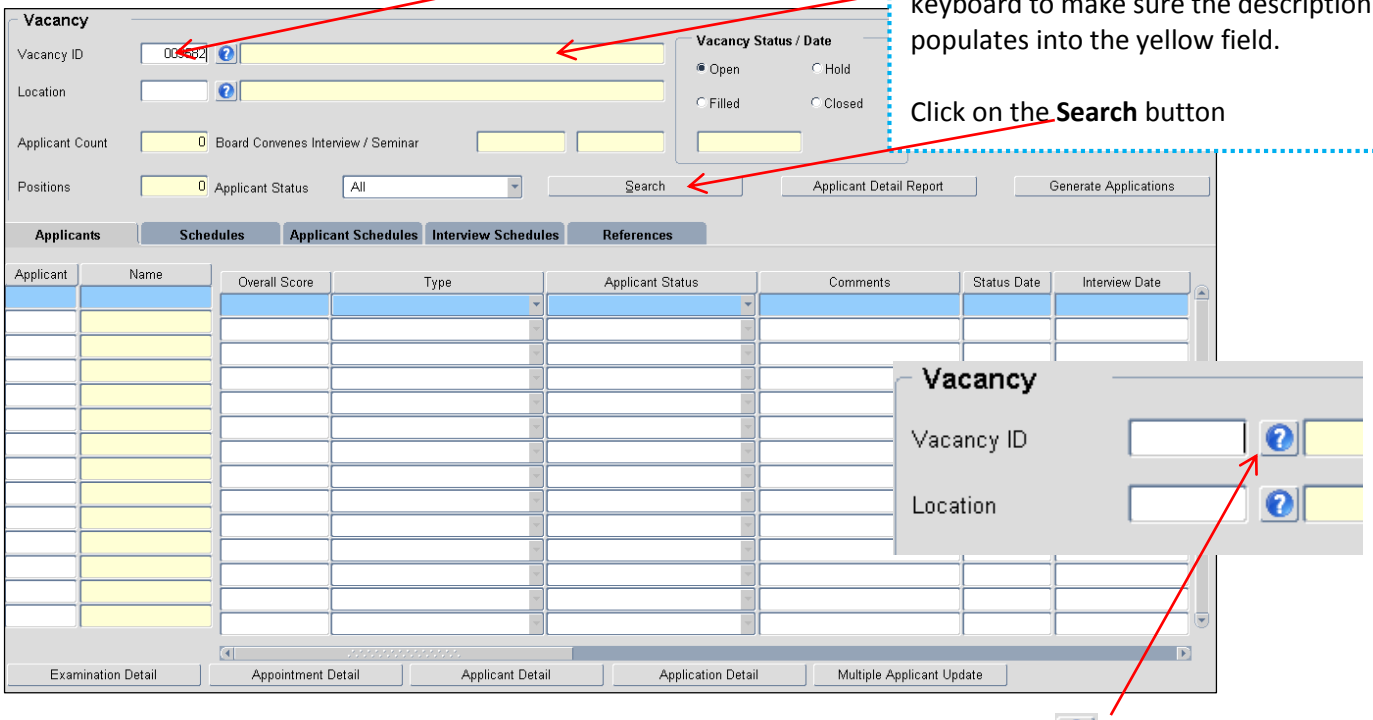
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

Type your Vacancy number into the **Vacancy ID** field

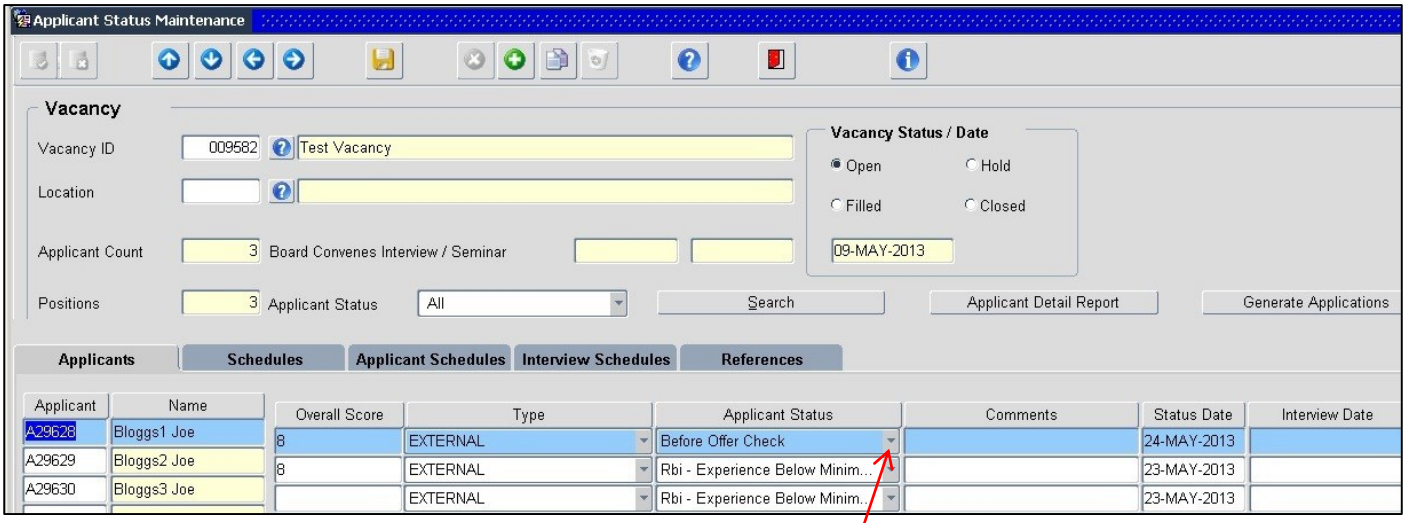
Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button



Alternatively, you can also search by the description of your vacancy, by clicking on the button.

After clicking the Search button, you will see the Applicant Status Maintenance screen



This is where you would change the applicant status to Before Offer Check, which would notify your Local HR team

When your Local HR team receive the notification, they will assess the situation and then notify the Recruiter of the outcome.

This will be in the form of either a **Successful Check** or an **Unsuccessful Check**.

If the outcome is a **Successful Check**, Local HR will contact the Recruiter with details of how to proceed.
Within eRecruitment, the Successful Check falls into 4 main categories:

- New Start
- Casual Member of Staff
- Current / Current and Ex-Employee
- Ex-Employee

Following the notification from Local HR to the Recruiter, Local HR will change the applicant status to Successful Check for all of the 4 categories except New Start. If the Successful Check is a New Start, then the Recruiter can update the Applicant Status to Successful Check.

NB: The Recruiter may be required to carry out further action depending upon the specific results of the successful check. (This will be communicated to the Recruiter by Local HR)

- For a **Casual Member of Staff** or **Current / Current and Ex-Employee**, the Recruiter will need to complete the **Transfer User Defined fields**.
- For an **Ex-Employee**, the Recruiter may need to complete the **Rehires User Defined fields**.

After the Applicant Status has been changed to Successful Check, the Recruiter may offer the post to the successful applicant.

If the Before Offer Check is an Unsuccessful Check, Local HR will contact the Recruiter to advise this outcome.

Local HR will change the applicant's status to Unsuccessful Check in Back Office.

The applicant will not be offered the post and the Recruiter should advise the applicant they have been unsuccessful.

How to offer a post to successful applicant from the system via email

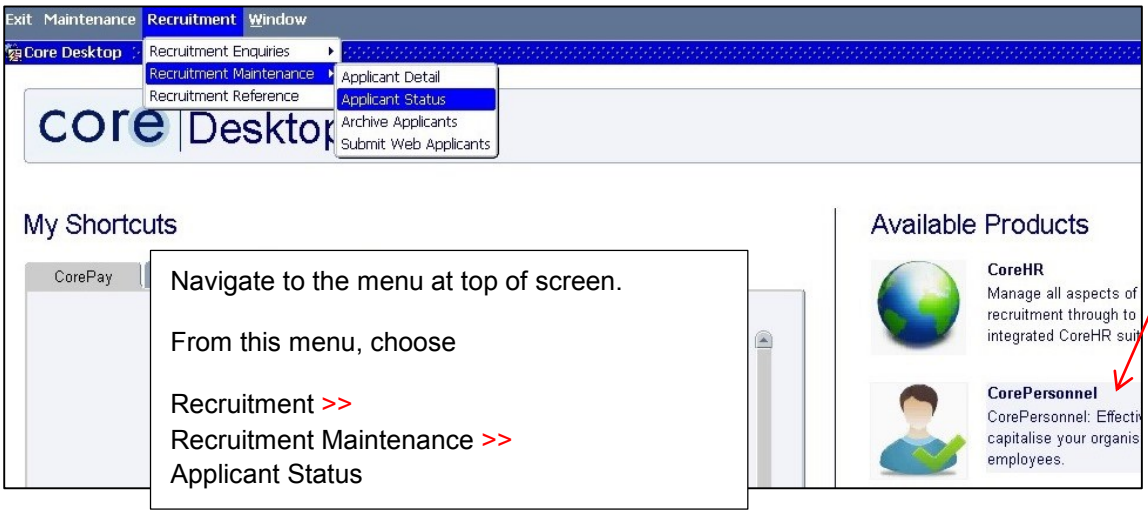
After your Local HR team has confirmed the Before Offer Check has been successful, you can go ahead and offer the post to the successful applicant

This can be done either by sending an email via the eRecruitment system or by telephone.

To send an offer email via the eRecruitment system, you will need to firstly access the Applicant Status Maintenance screen.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

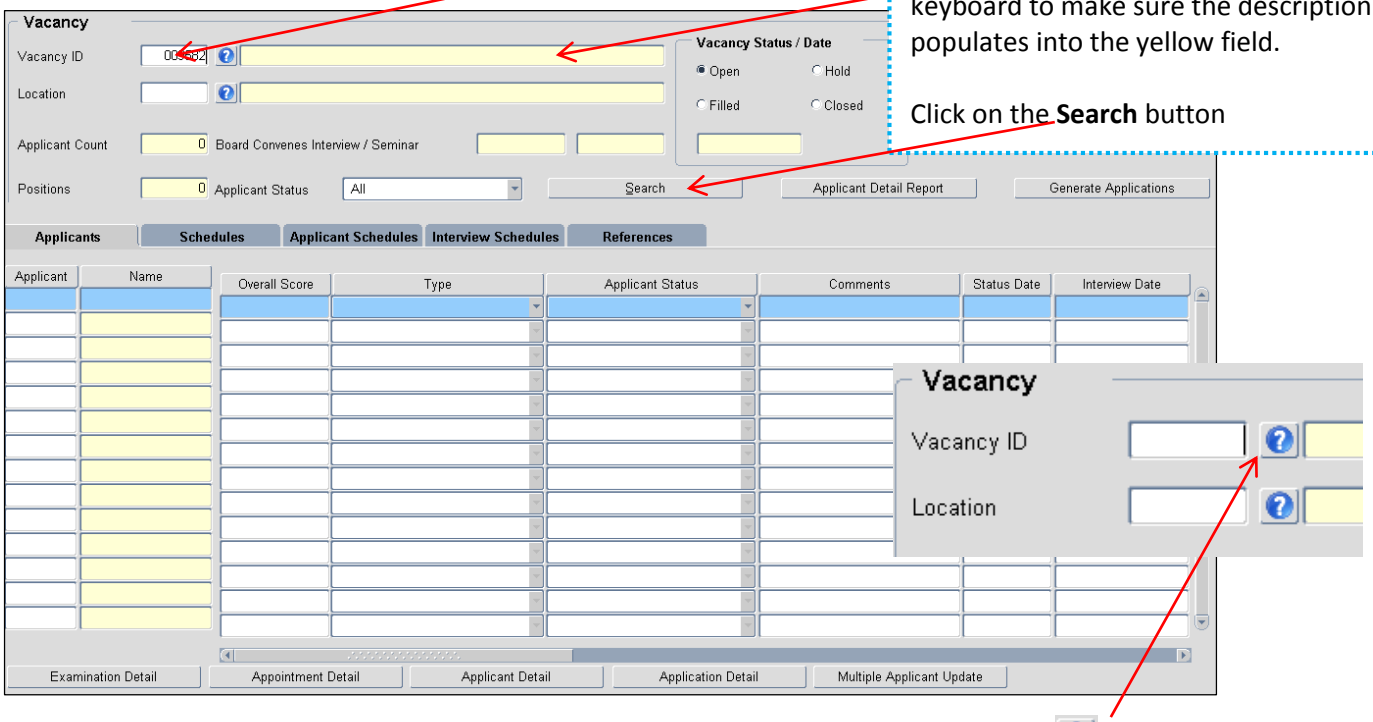
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

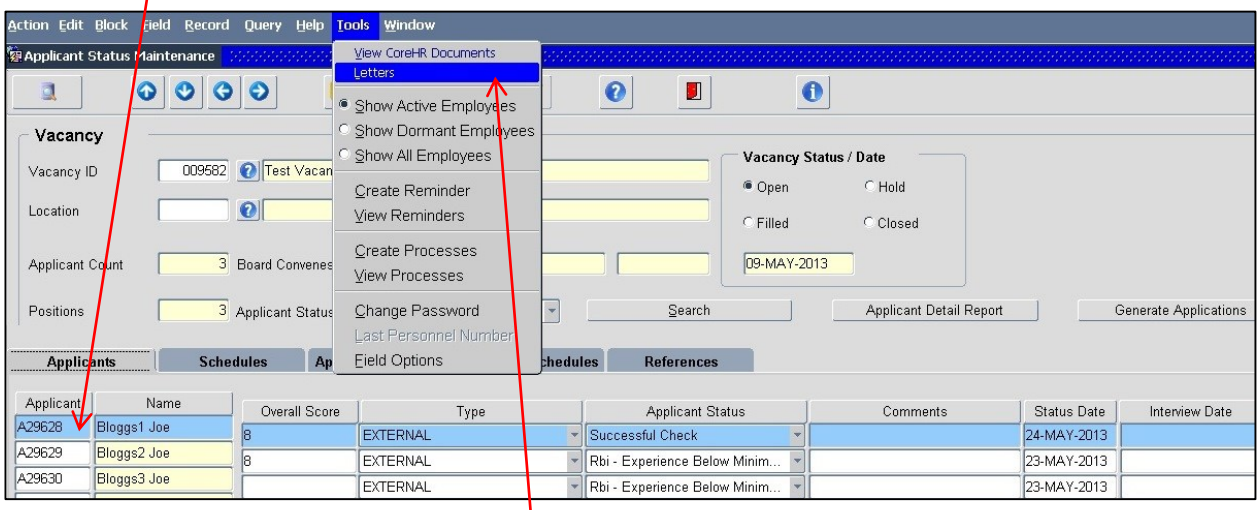
Click on the **Search** button



Alternatively, you can also search by the description of your vacancy, by clicking on the button.

After clicking the Search button, you will see the Applicant Status Maintenance screen

If you are emailing one applicant individually, make sure your desired recipient is highlighted in your list of applicants. You can see **A29628 Joe Bloggs1** is highlighted in the screenshot below.



After your applicant is selected, click on **Tools >> Letters** from the menu at the top of the window.

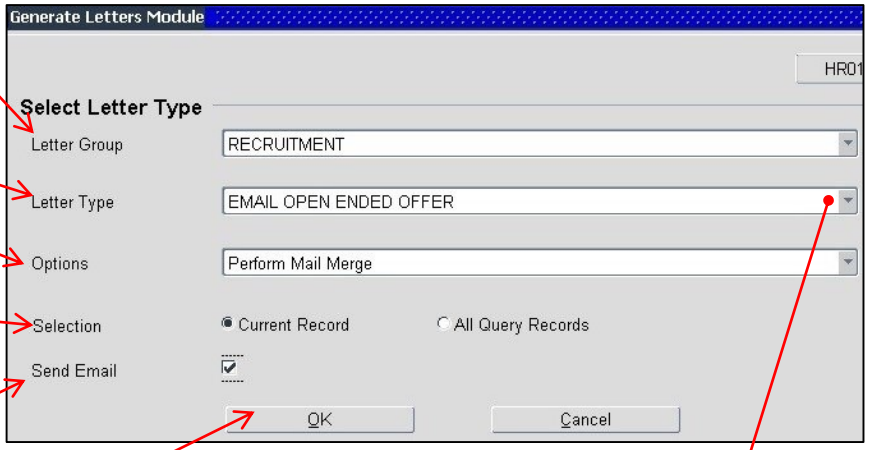
Letter Group - choose Recruitment

Letter Type - choose the one that is applicable to you. In this example, we are making an open ended offer

Options - choose Perform Mail Merge

Selection - make sure Current Record is selected

Send Email - make sure box is ticked



After clicking the **OK** button, the Send E-mail screen will appear.

EMAIL FIXED TERM OFFER
EMAIL FIXED TERM OFFER CONDITIONAL
EMAIL OPEN ENDED OFFER
EMAIL OPEN ENDED OFFER CONDITIONAL

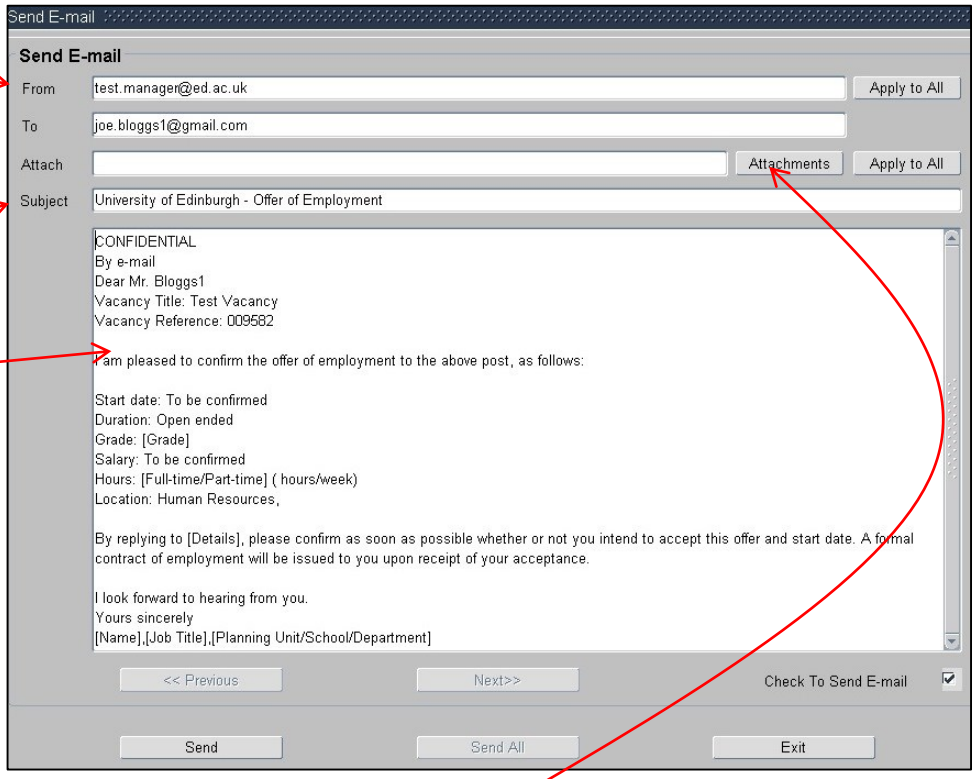
The main Letter types when making an offer to an applicant are

From: Type your email address, or the email address of another appropriate staff member.

Subject: Edit as required

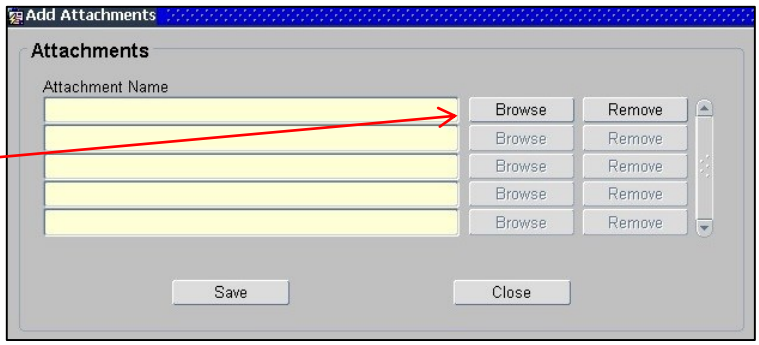
Main Body: Edit as required. Default text is provided and you can change this to suit. You do need to edit the main body and remove any of the [brackets and examples]

NB:
The character limit is 2000



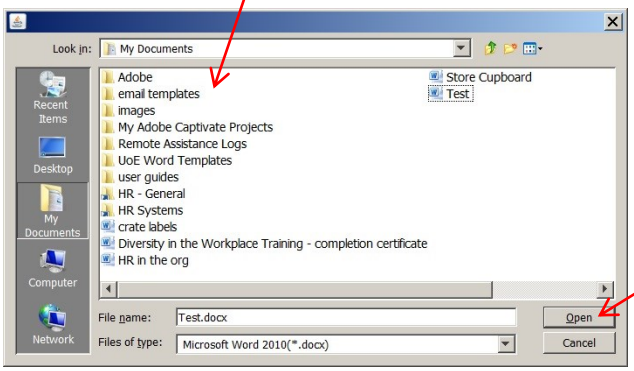
You can attach a document to your email, by clicking on the **Attachments** button.

After you have clicked on the Attachments button, the Add Attachments window will appear.



To attach the document from your computer, click on the **Browse** button.

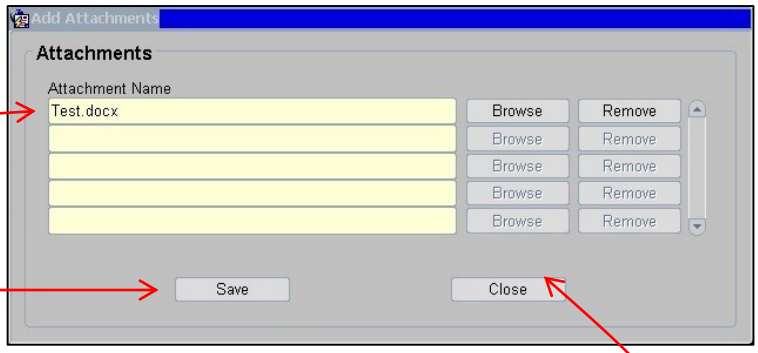
This will open up a window to allow you to select your document. It may open your My Documents folder by default.

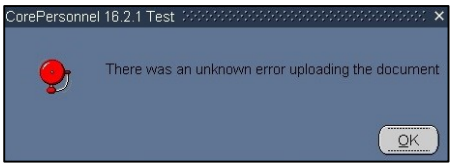


Once you have selected your document, click on the **Open** button

The Add Attachments window will appear again and you can see your document in the yellow **Attachment Name** field

Then click on the **Save** button

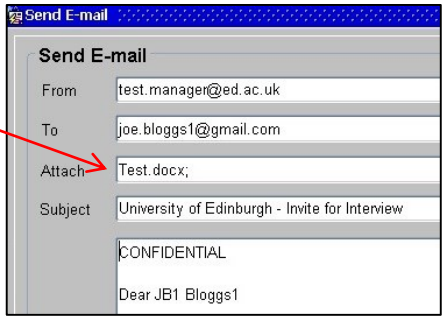




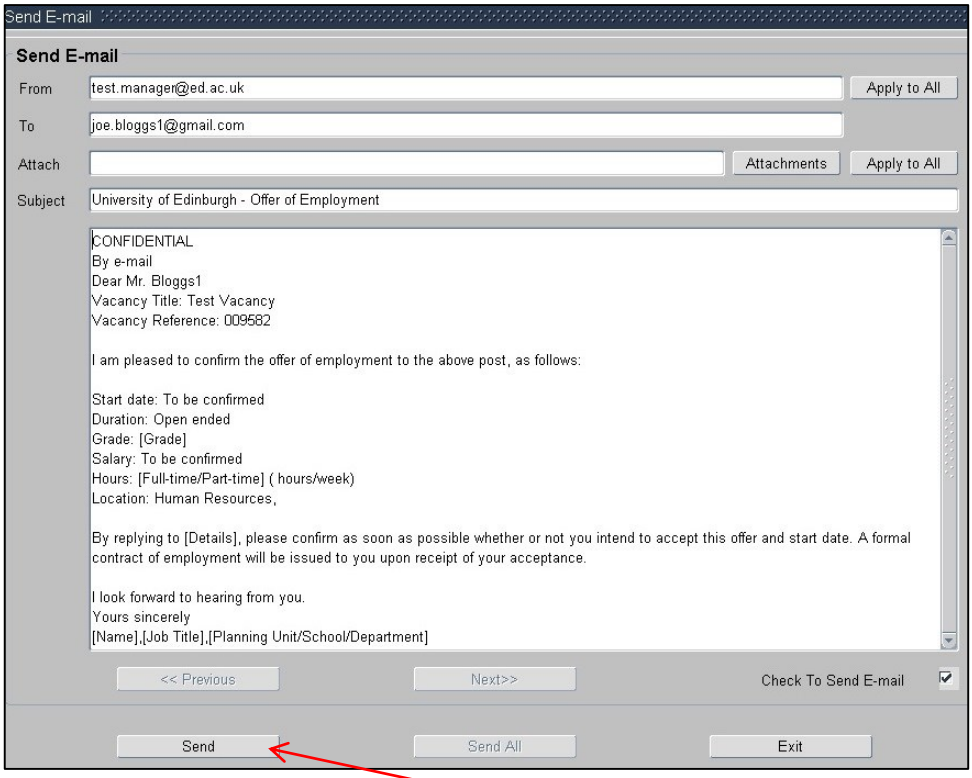
You will then see two message windows.
Click **OK** to both, then click on the **Close** button

You are then returned to your Send E-mail window

You can now see your attachment.



You are not able to remove an attachment from the Send E-mail window. You have to go back into the Add Attachment window and click the Remove button, then the Save button.



After you have checked that all details within the email are correct, click on the **Send** button.

A confirmation message will appear. Click the OK button.

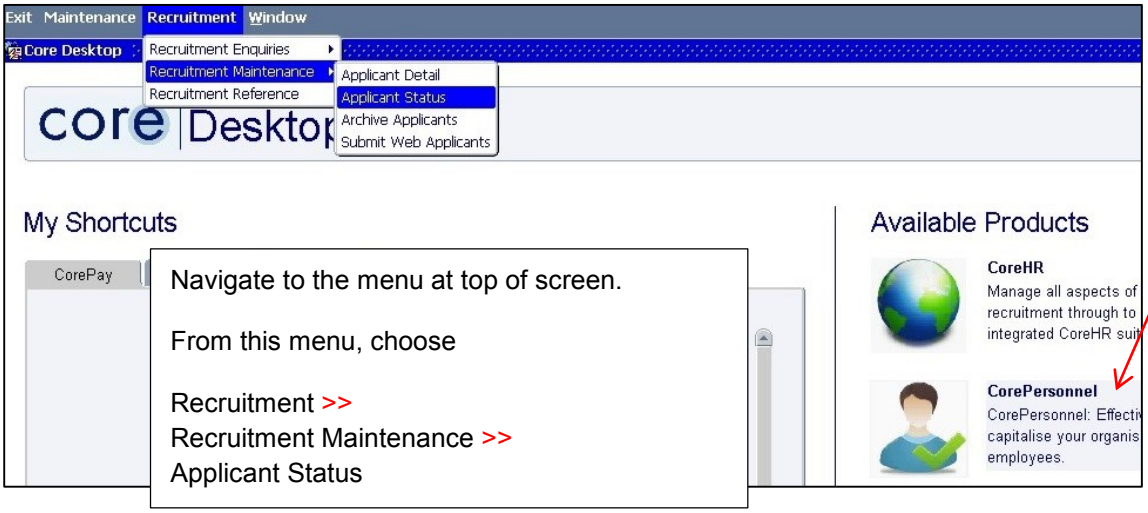
How to complete appointment details once the post has been offered to the successful applicant

It should be noted, you would only complete the appointment details after the successful applicant has accepted the offer and not before.

To update the appointment details for the successful applicant, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

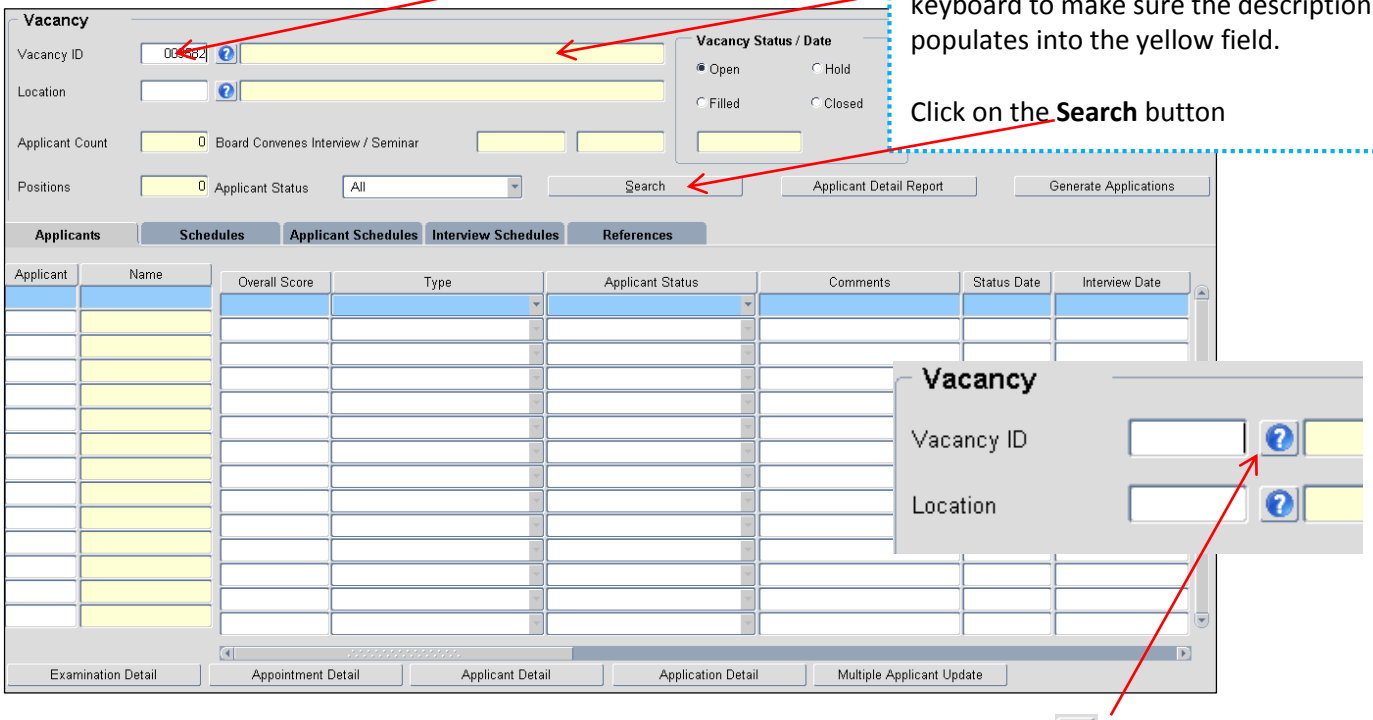
From within the eRecruitment back office, click on Core Personnel



Type your Vacancy number into the **Vacancy ID** field

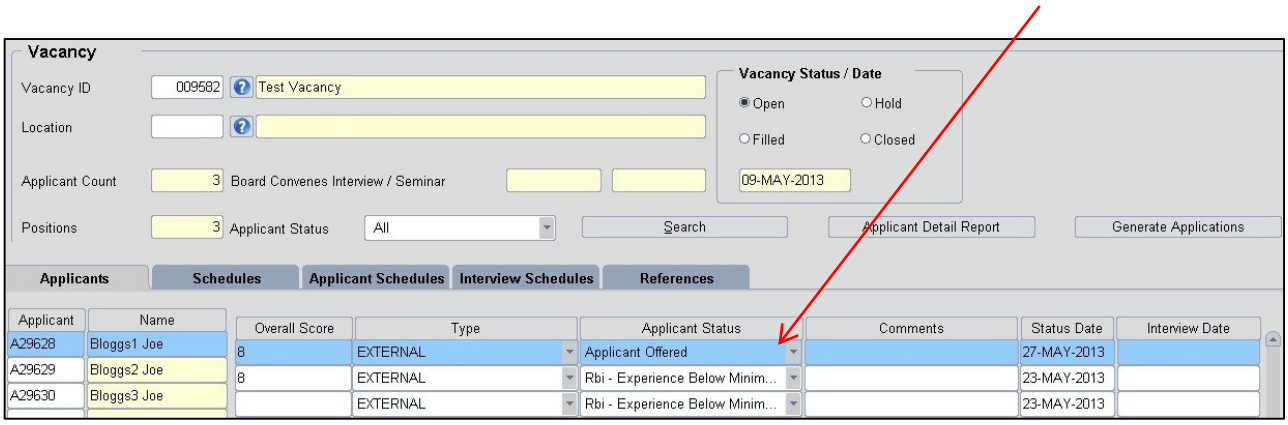
Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button



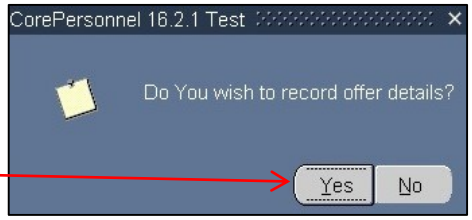
Alternatively, you can also search by the description of your vacancy, by clicking on the button.

Make sure the correct applicant is selected and update the Applicant Status to show **Applicant Offered**.



You will then see a message asking you if you want to record offer details.

Click on the **Yes** button.



After clicking on the **Yes** button to record the offer details, the **Appointment Offer** screen will appear.

Most of the information will be populated already as this was entered at the time the staff request was raised.

There are 4 steps for Appointment Offer, with your starting screen being **step 1 of 4**

Appointment Offer

Post Details

Offer Effective Date 03-JUN-2013 Target End Date

Offer Details (Step 1 of 4)

Offer Details:

Pay Details:

Please enter the offer information for the employee on this screen.

Details such as department, job title and cost centre may be entered here.

Hierarchy Details

University	5	UNIVERSITY OF EDINBURGH
Support Grp/ College	CSG	Corporate Services Group
Planning Unit/School	P64	Human Resources Planning Unit
Department	D424	Human Resources
Location	5154	9-16 CHAMBERS STREET
Cost Centre	101000	101000
Job Segment 1		
Job Segment 3		
Responsible To		

Appointment Details

Post Type	N	NO
Project		
Job Category	0011	DISCLOSURE IS NOT REQUIRED
Job Title	11 Job Text	HUMAN RESOURCES
Employee Status	N	NO
Sub Status		
Category	N	NEW
Sub Category	NEW	NEW
Hours	35.00	FTE Hours
FTE		FTE%
Pensionable	Acting Up Ind	Secondment
Action		
Reason Code		
Replaces Employee		
Comments		

35 Hours
36 Hours
39 Hours
40 Hours

Cancel

Next >>

Do not enter anything in this field

NB: For Guaranteed Hours Contracts

Sub Category	NEW	NEW	
Hours	.00	FTE Hours	35 Hours
FTE	1.000000000000	FTE%	100.000000000000
Pensionable	Acting Up Ind	Secondment	

Hours will be 0. Select **35 Hours** from the list.
You need to type 1 into the **FTE** field then **Tab** key

On the **FTE Hours** field, click the drop down list to reveal 4 options.
Select which is applicable.
Then press the **Tab or Enter** key on your keyboard.
This will populate the FTE and FTE% field.

After the FTE field and the FTE% fields are populated, click on the **Next** button

For Reference:
35 Hours - Applicable contract types - AC, AM, TR1, UE
36 Hours - Applicable contract types - MC
39 Hours - Applicable contract types - MA
40 Hours - Applicable contract types - ACN, ACN2, ACT, AMN, AMN2, AMT, AM3A, AM3B

The screen below allows you to enter start and end dates and check if the Date of Birth is in the system.

This Screen is **step 2 of 4**

Appointment Offer

Appointment Details

Offer Details (Step 2 of 4)

Probation Expiry
Contract Type
Contract Start Date
Contract End Date
Contract Reason
Contract Purpose

Offer Details:
Pay Details:

Please enter the offer information for the employee on this screen.

Details such as department, job title and cost centre may be entered here.

Work Authorisation Required
GA Approval Required
UL Post Code Ref
Comments

NI Number: NM124568D
Date of Birth: 01-JAN-2000
Status: New employee

Cancel | << Previous | Next >>

For both Open Ended and Fixed Term appointments, you need to enter the Contract Start Date.

In the **Contract Start Date** field, enter the date the employee will start the role
You can either type this in the format DD-MON-YYYY or click on the blue and black icon to the right of the field and select the date from the calendar.

The **Date of Birth** field is a mandatory field for an online application. Therefore, in normal circumstances the DOB field will always have a value.
However, if the Recruiter links an applicant to a vacancy which has not been advertised, the DOB field will be blank.
The Recruiter should not update the DOB field in this screen. The Recruiter should email hr.systems@ed.ac.uk or phone 0131 650 8126 and request the DOB be added to the applicant number (e.g. A12345)

An example of a vacancy that has not been advertised is when an applicant has applied out-with the eRecruitment system. In this instance, you would need to create the applicant and link the applicant to the vacancy.

The **National Insurance** number is not a mandatory field when applying online, as some applicants may not have a NI number.

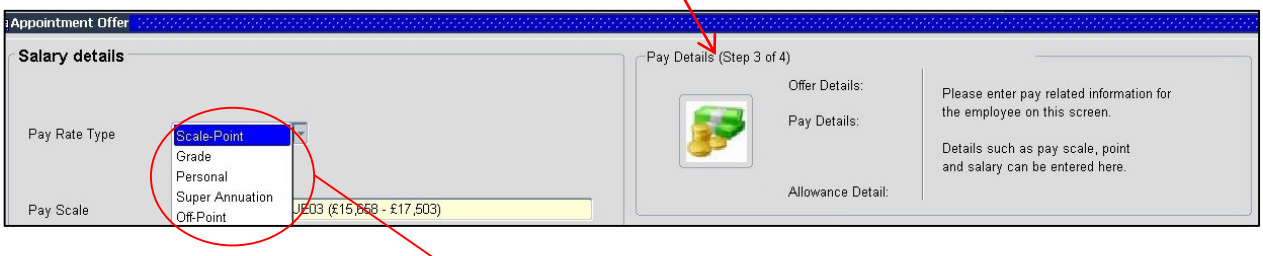
It is possible for the Recruiter to enter the NI number in this field. However, this is not advisable as the NI number will not feed into the Oracle HR database, which in turn will stall the process.

The correct way to enter the NI number is in the Applicant Details screen.
You get to this screen from the menu:
Core Personnel >> Recruitment >> Recruitment Maintenance >> Applicant Details

Click the **Next** button to take you to the next step

You will now see the Salary details screen.

This screen is **step 3 of 4**

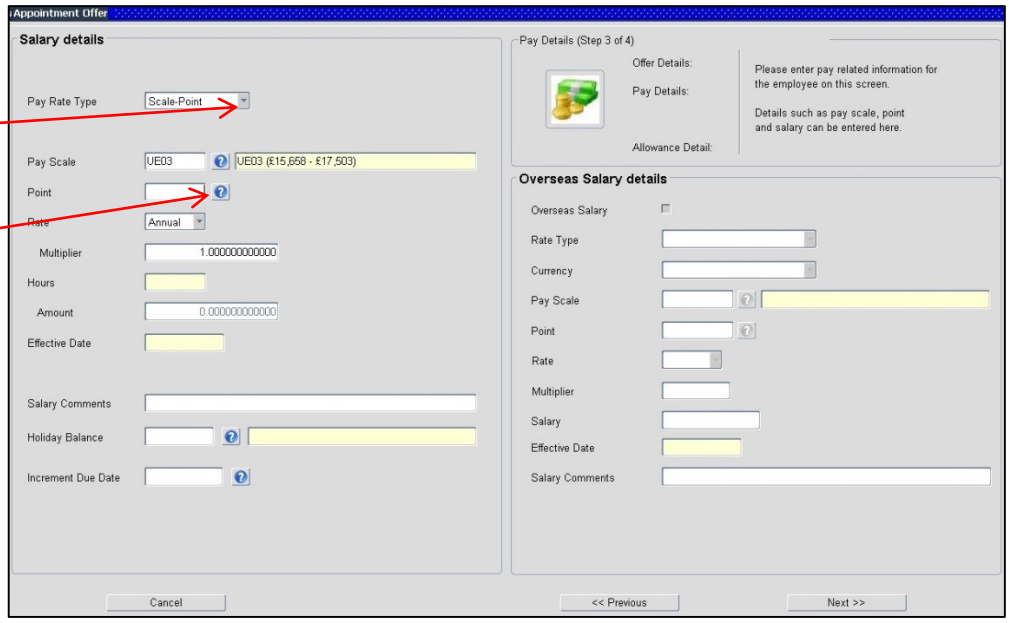


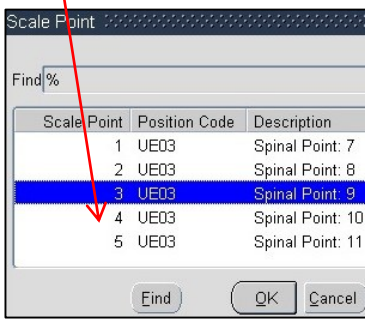
In the Pay Rate Type field, it will default to **Scale-Point**. Always use **Scale-Point**, unless your applicant is off scale salary. If it is off scale salary, choose **Off-Point** from the drop down list.

The majority of appointments will be Scale Point Salary.

Scale-Point is the default

In the **Point** field, click the icon and choose from a list. In this example, Scale point 3 for UE03 grade has been selected.

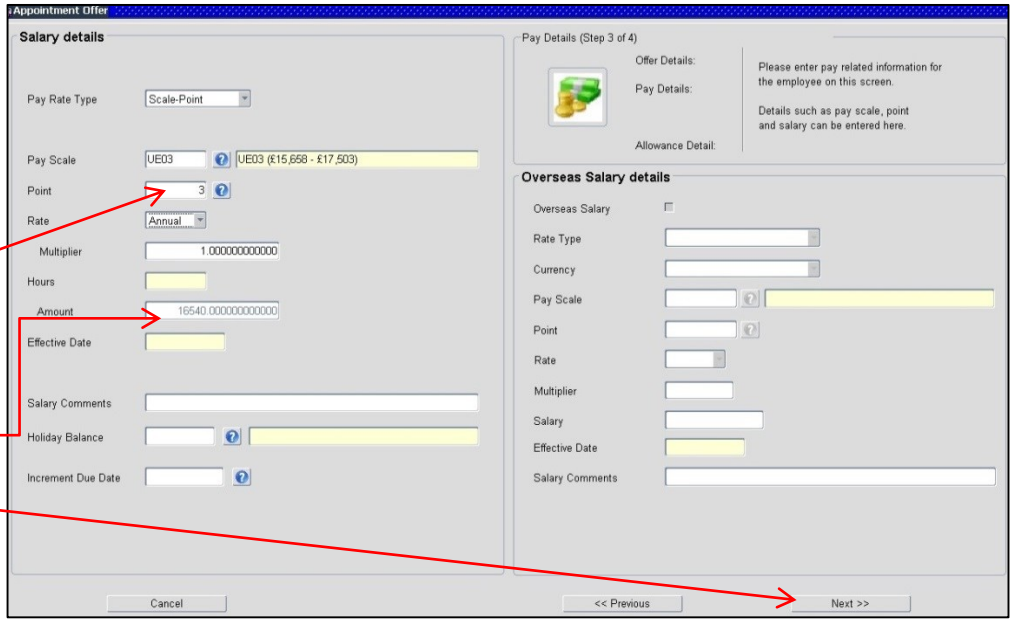


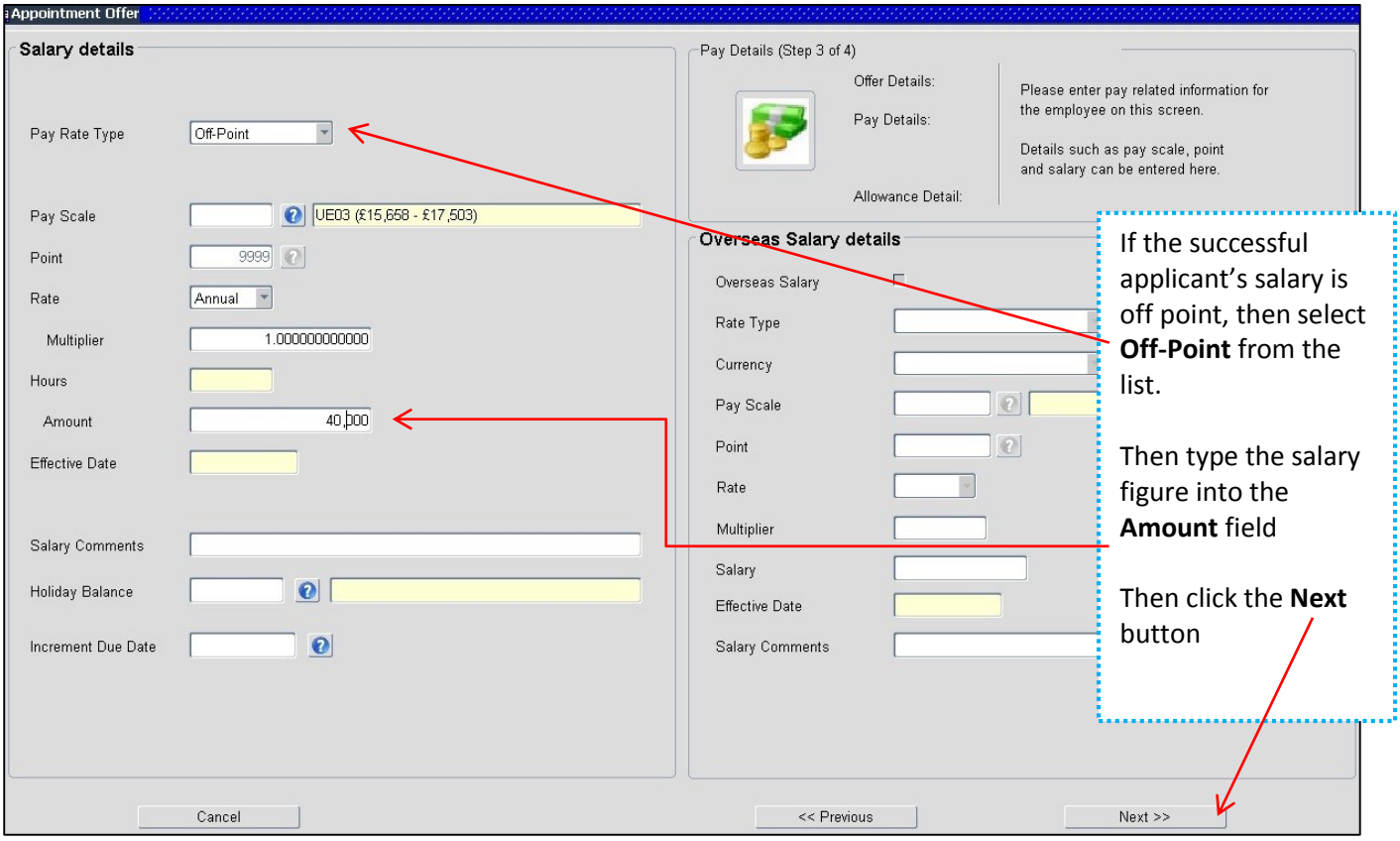


After you click the **OK** button, the Scale point will be visible.

Press the **Tab** or **Enter** key on your keyboard. This will populate the salary in the **Amount** field.

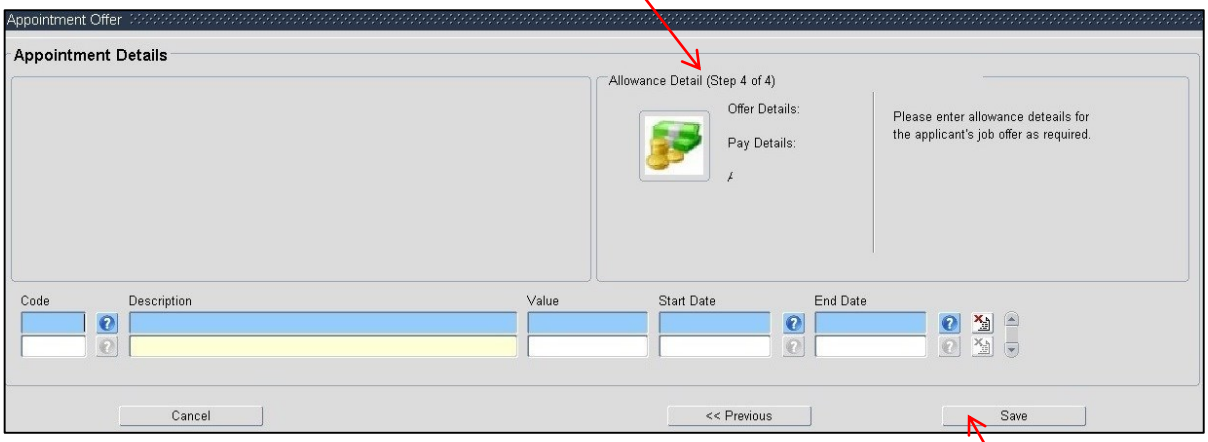
Then click the **Next** button.





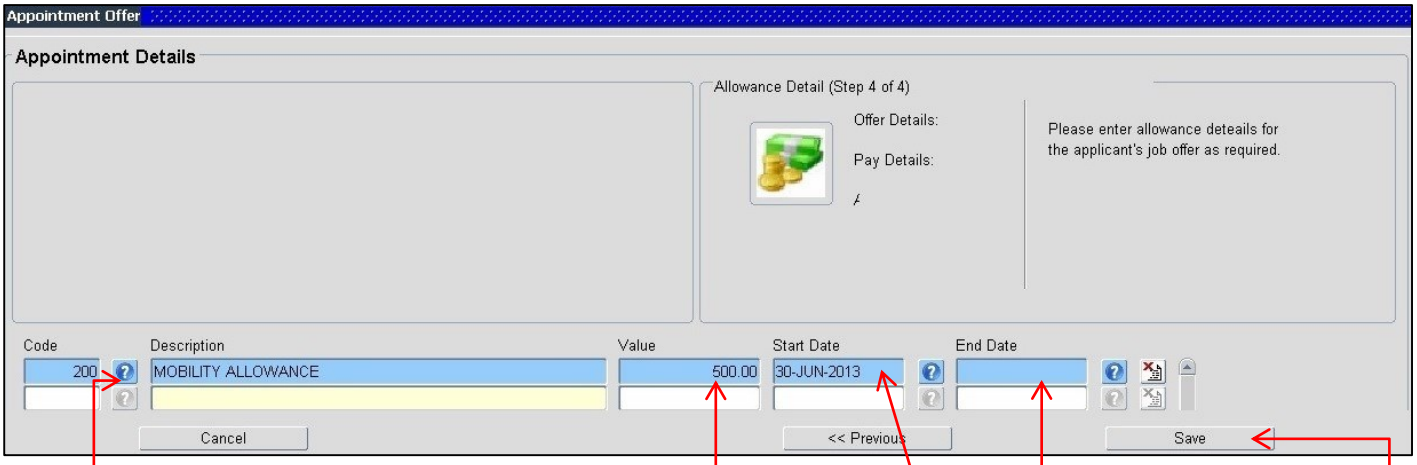
NB: If you have an instance where a discretionary point is to be applied, this cannot be done via eRecruitment. For discretionary salary points, refer to your local HR.

After clicking the Next button you will see the **Allowances** screen which is **step 4 of 4**

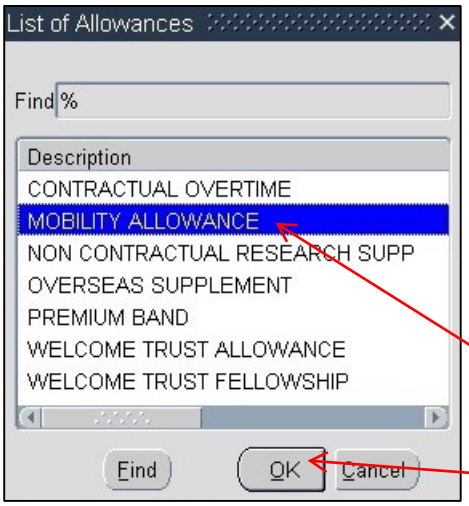


If any contractual allowances have been agreed during negations with the successful applicant, these would be entered in this screen.

If no contractual allowances have been agreed, click the **Save** button, then the OK button.



To add an allowance, click the icon



This will open up a list for you to choose an allowance type

In this example, Mobility Allowance has been chosen. Click on **Mobility Allowance**

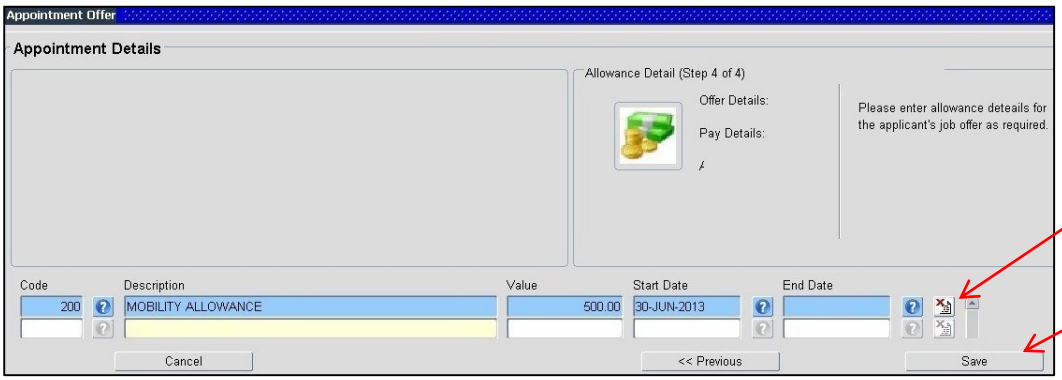
Then click the **OK** button

After you have chosen your allowance, you need to type the allowance amount in the **Value** field.

Then enter a **Start Date**. Enter in a DD-MON-YYYY format or click the icon to choose from a calendar.

You do not need to enter an **End Date**

After you have entered the details of the contractual allowance, click the **Save** button, then **OK** button



If you have entered an allowance incorrectly, you can delete this by clicking on the icon

Then click the **Save** button, then **OK** button

How to complete the User Defined fields

The User Defined fields are applicable to appointments for:

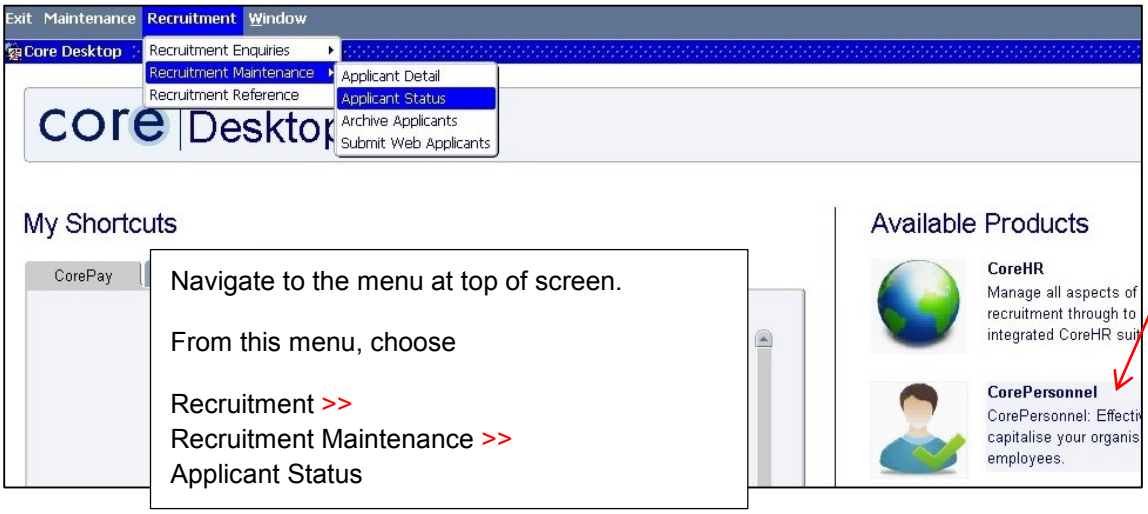
- existing members of staff
- ex-members of staff
- vacancies which require a PVG check

Following a Before Offer Check, User Defined Fields may need to be completed and Local HR will advise the Recruiter which User Defined Fields should be completed if applicable.

To access the User Defined Fields, you need to be in the **Applicant Status Maintenance** screen.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

From within the eRecruitment back office, click on Core Personnel



Navigate to the menu at top of screen.

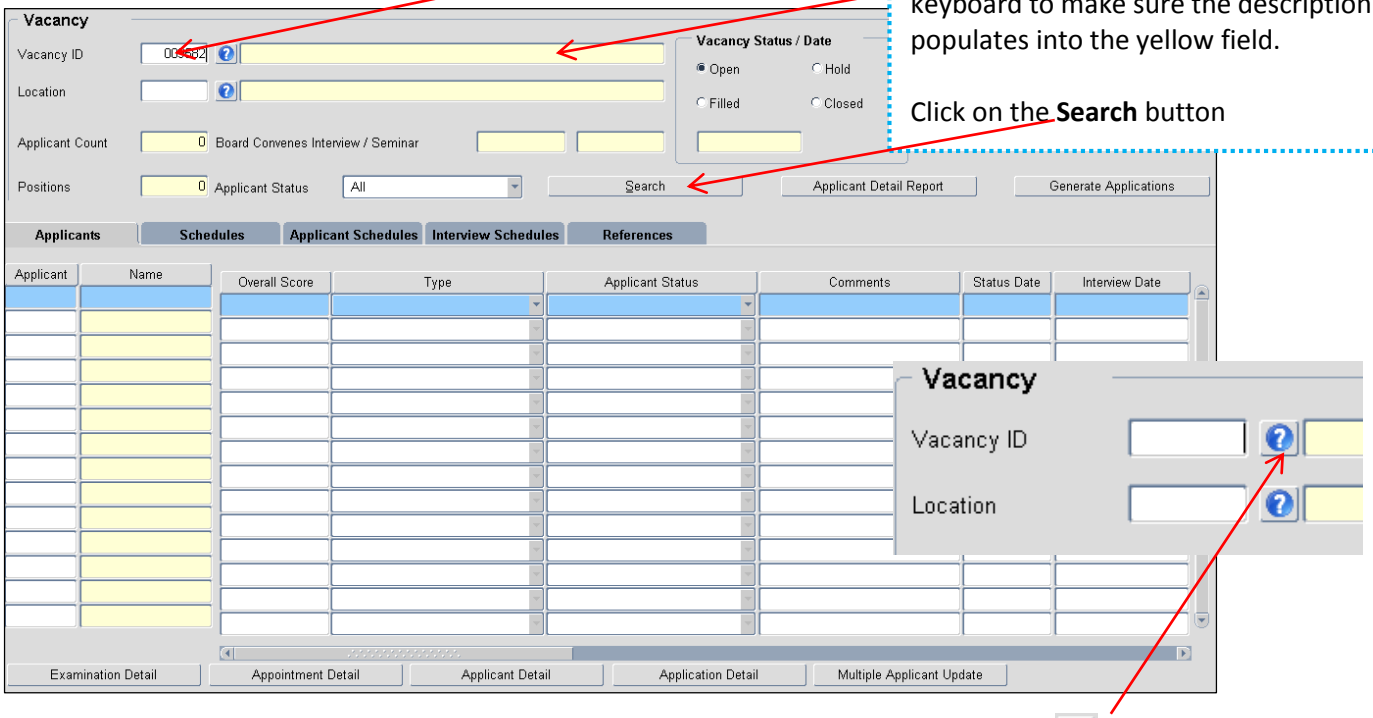
From this menu, choose

Recruitment >>
Recruitment Maintenance >>
Applicant Status

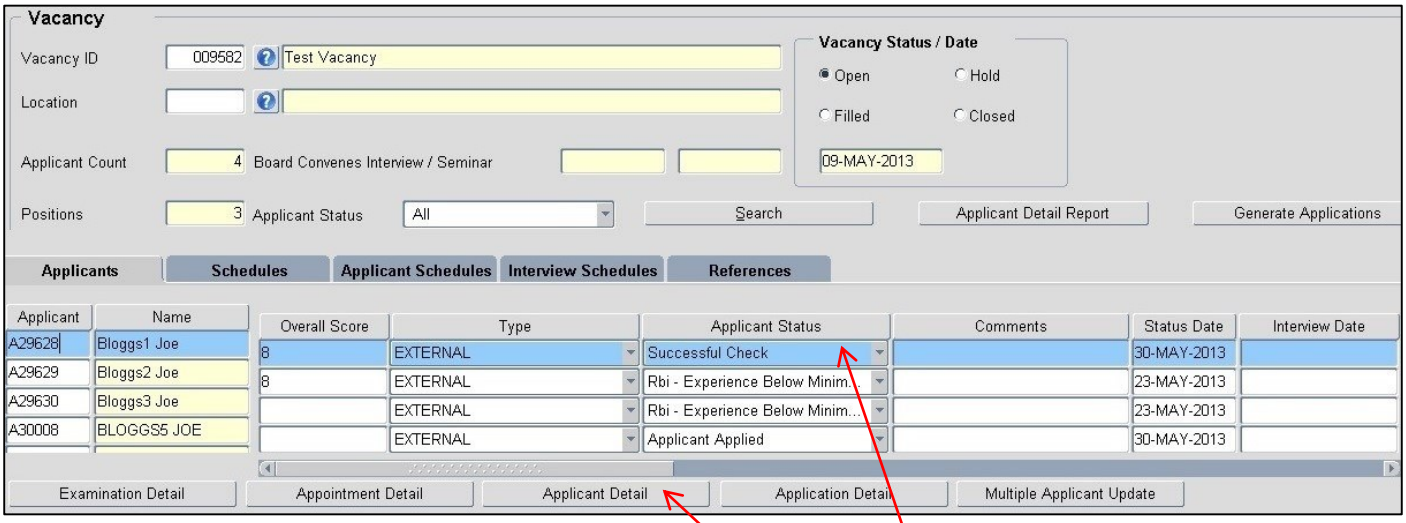
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button

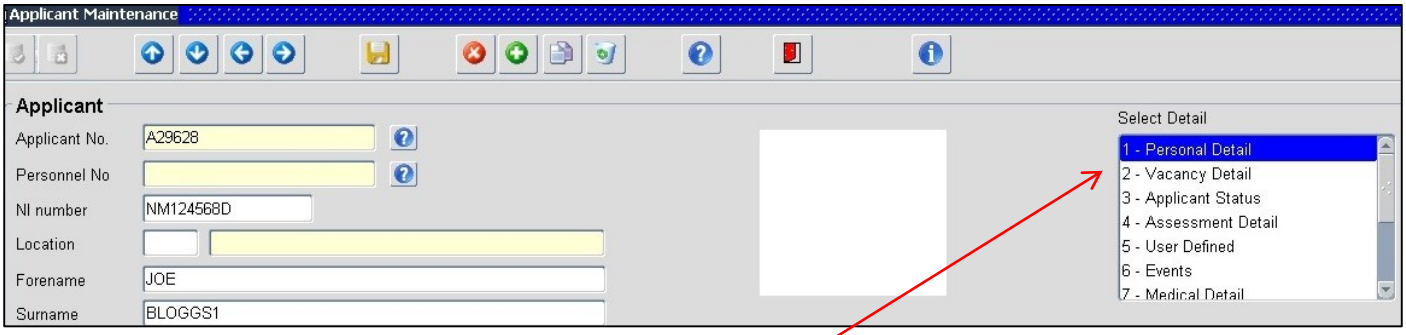


Alternatively, you can also search by the description of your vacancy, by clicking on the button.

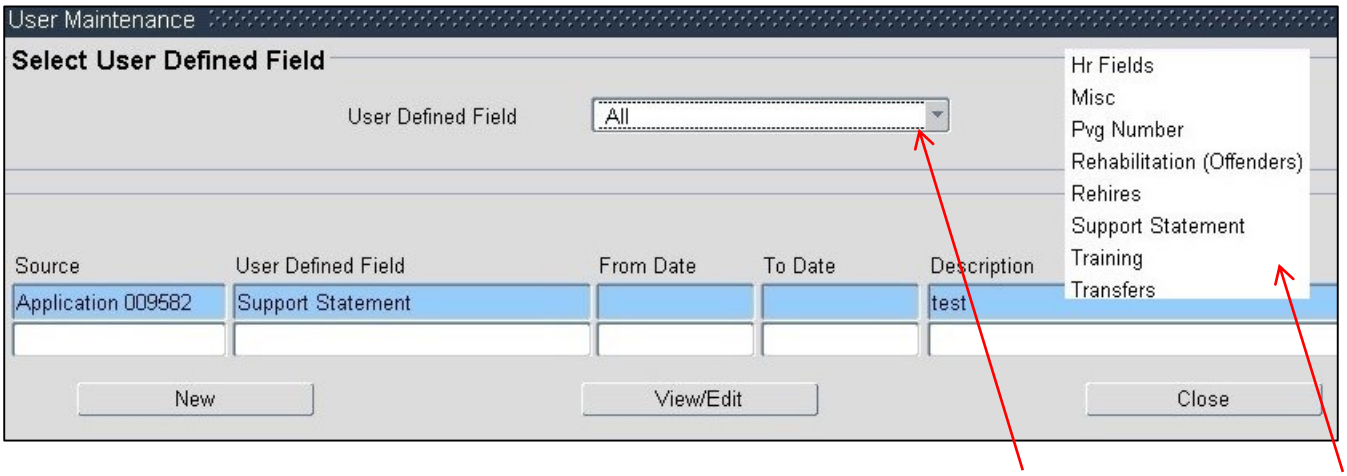


The Recruiter will notice Local HR has updated the applicant status to reflect the outcome of the before offer check.

Make sure the successful applicant is highlighted and click on the **Applicant Detail** button

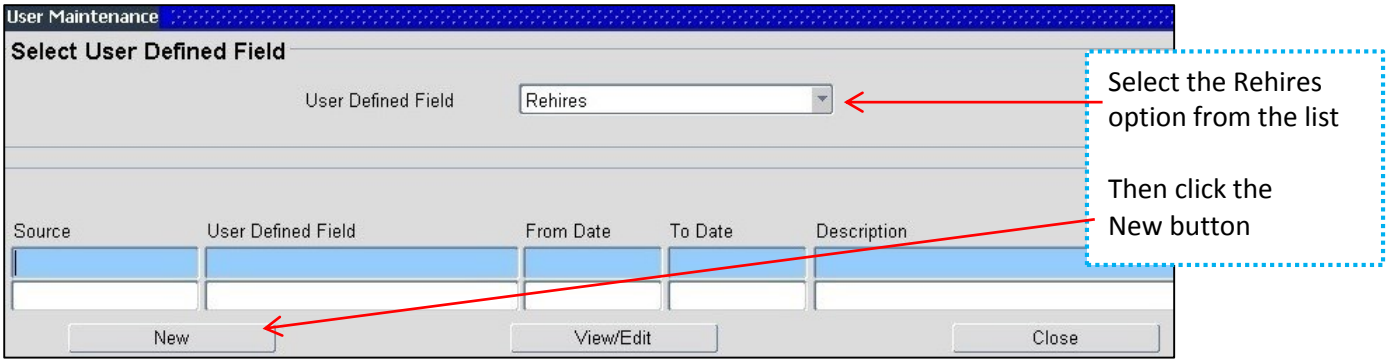


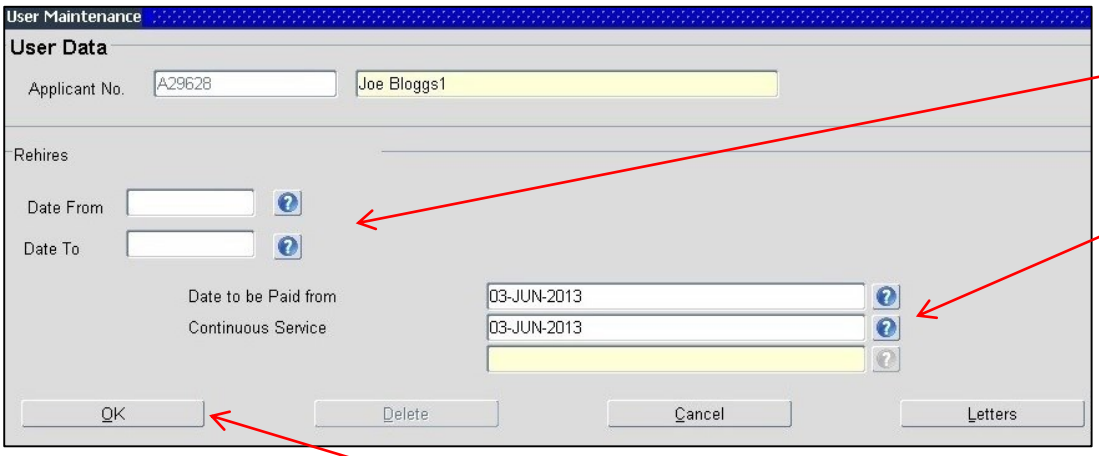
In the Applicant Maintenance screen, click on **5 - User Defined**



You will then see the **Select User Defined Field** screen. Click on the drop down list to reveal your options

When Local HR advise the Recruiter to complete the **User Defined Field Rehires** (usually when the successful applicant is deemed an **Ex-Employee**), the Recruiter should check with Local HR that a final process date has been entered in Oracle HR for the successful applicant and then do the following:



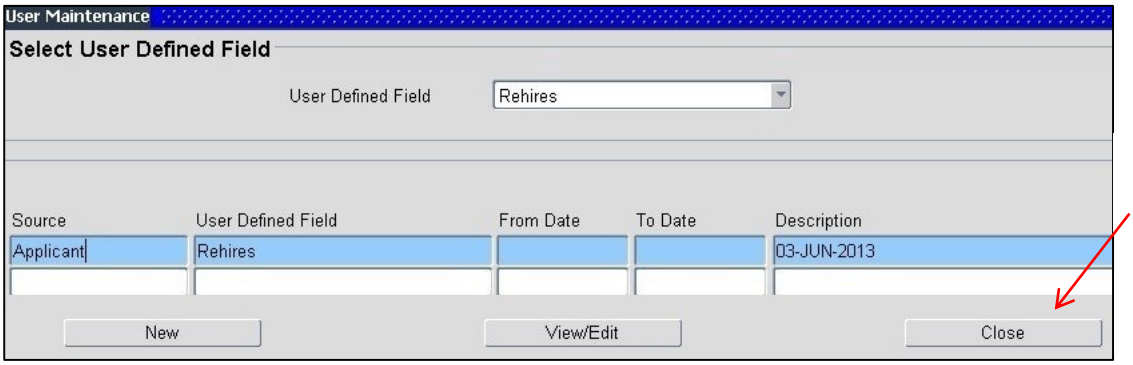


You do not need to enter anything in the **Date From** and **Date To** fields.

Enter the **Date to be paid from** and **Continuous Service** dates, in the format **DD-MON-YYYY** or click on the icon and select date from the calendar.

After entering your dates, click on the **OK** button

Then click **OK** button on the confirmation message



Then click on the **Close** button

When an ex member of staff returns to the University, it is possible the User Defined Field **Rehires** should be completed, although this is not always the rule.

When User Defined Field Rehires <u>is NOT required</u>

Example 1:
Jane Citizen leaves UoE in 31-May-2010 and is re-hired in 01-May-2013

In Oracle HR, 30-June-2010 was entered in the Final Process Date field for Jane Citizen.
In eRecruitment 01-May-2013 was entered in the Contract Start Date field.

As the date entered in Contract Start Date in eRecruitment is after the Final Process date in Oracle HR
AND
this is actually true information, then it is likely that the User Defined Field **Rehires** is not required to be completed in this instance.

When User Defined Field Rehires <u>is required</u>

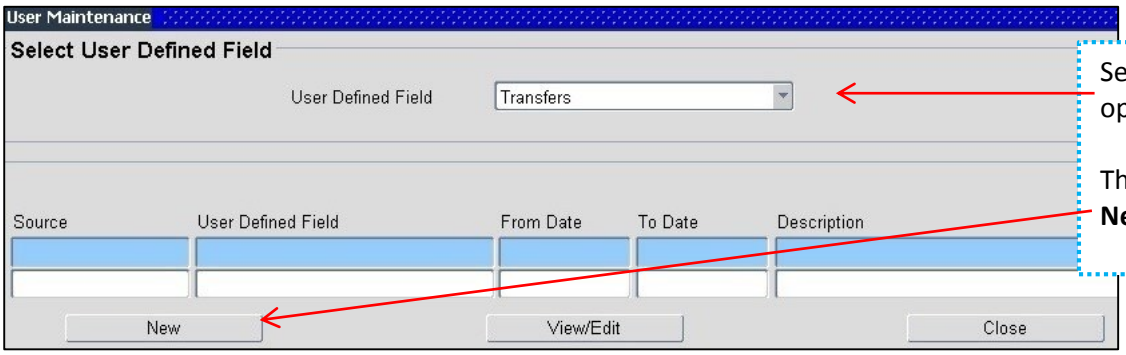
Example 2:
Joe Bloggs completes an assignment 31-May-2013 and is re-hired 03-June-2013.

In Oracle HR, 30-June-2013 was entered in the Final Process Date field for Joe Bloggs.
In eRecruitment 1-July-2013 **<u>has</u>** to be entered in the Contract Start Date field. (1 day after the Final Process Date in Oracle HR)
Even though the re-hire "true date" is 03-June-2013, this cannot be entered in eRecruitment as Oracle HR will refuse to pull the record through from eRecruitment based on business rules.

Instead, the "true date" of 03-June-2013 would be entered in the User Defined Field **Rehires** in eRecruitment, where the **<u>Date to be Paid from</u>** and **<u>Continuous Service</u>** would both have 03-June-2013 entered. (As per illustration on previous page)

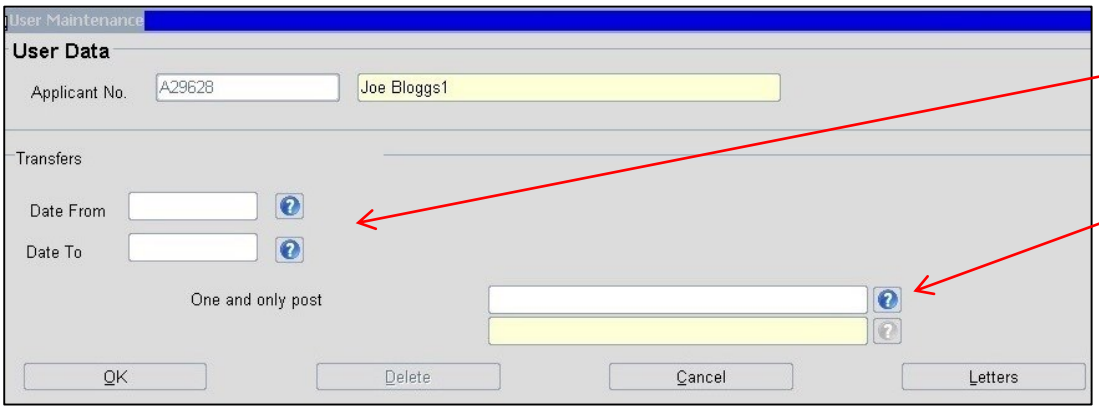
This is an example of when the User Defined Field **Rehires** should be completed.

When Local HR advise the Recruiter to complete the **Transfers User Defined Field** (usually when the successful applicant is deemed a **Current/ Current & Ex-Employee**), the Recruiter should do the following:



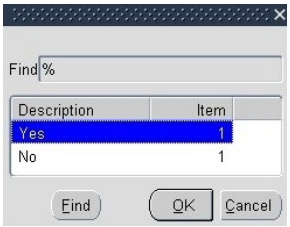
Select the Transfers option from the list

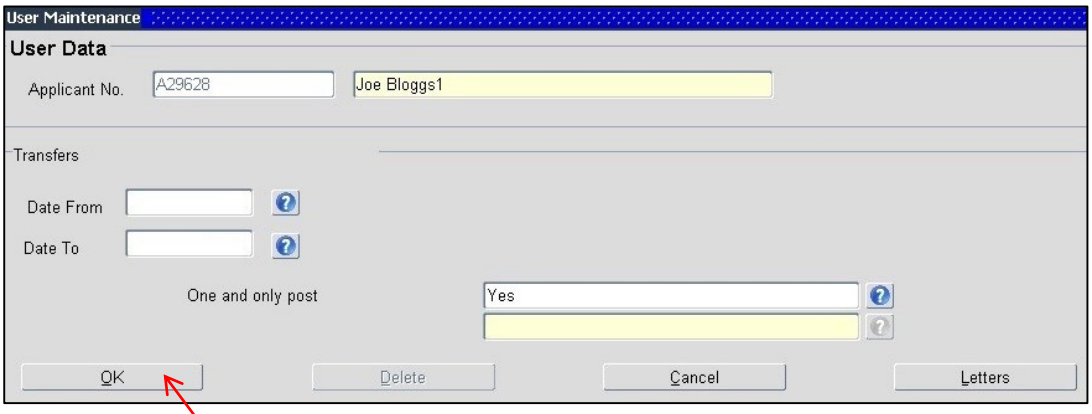
Then click the **New** button



You do not need to enter anything in the **Date From** and **Date To** fields.

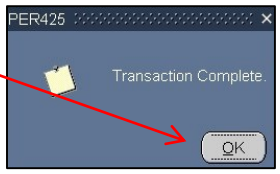
click on the icon and select either Yes or No

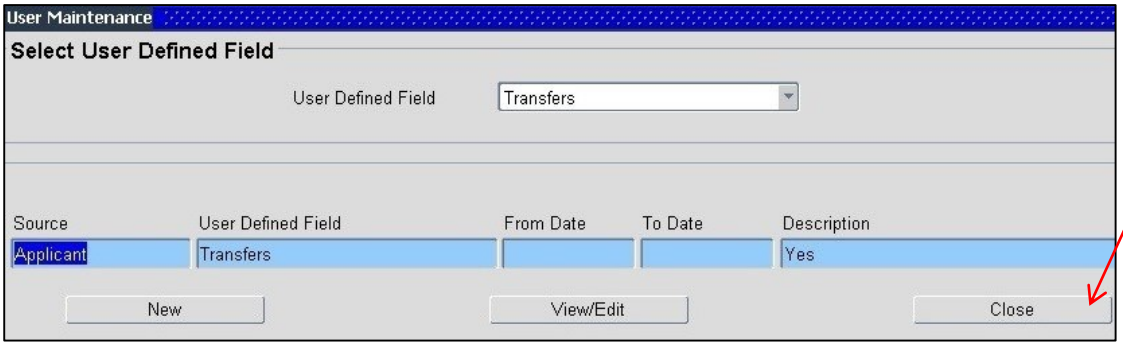




click on the **OK** button

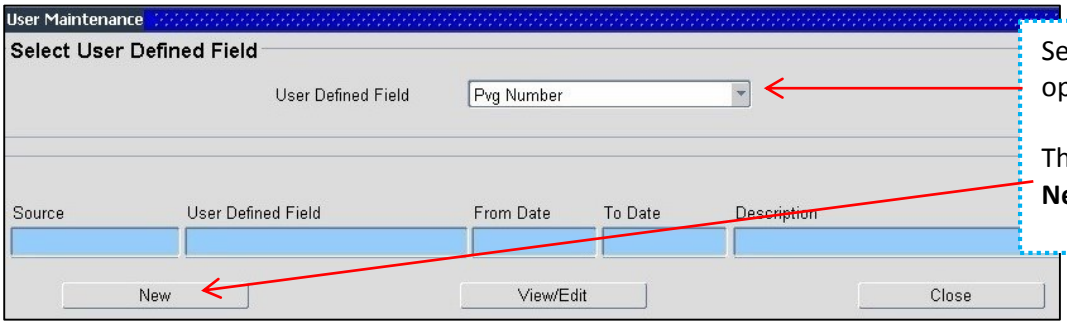
Then click **OK** button on the confirmation message





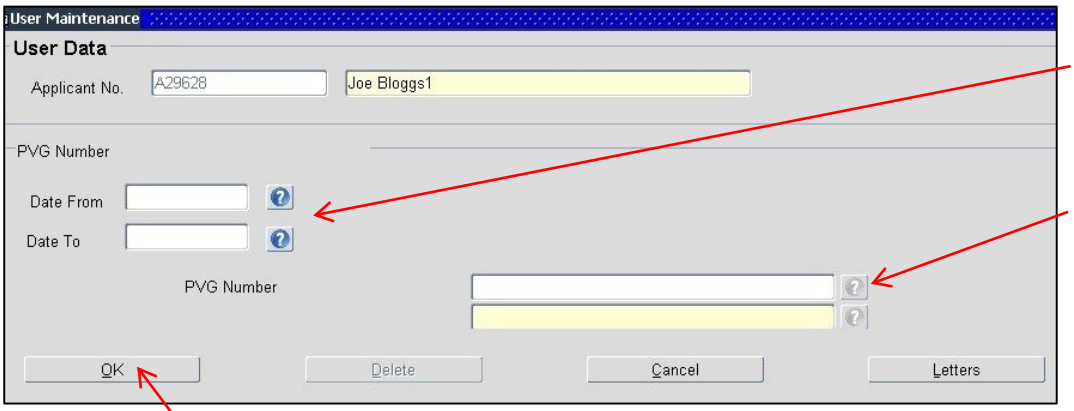
Then click on the **Close** button

If the vacancy required a PVG check, you will need to complete the PVG user defined field.



Select **Pvg Number** option from the list

Then click the **New** button

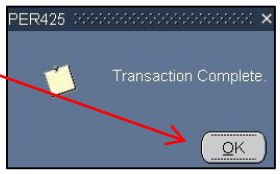


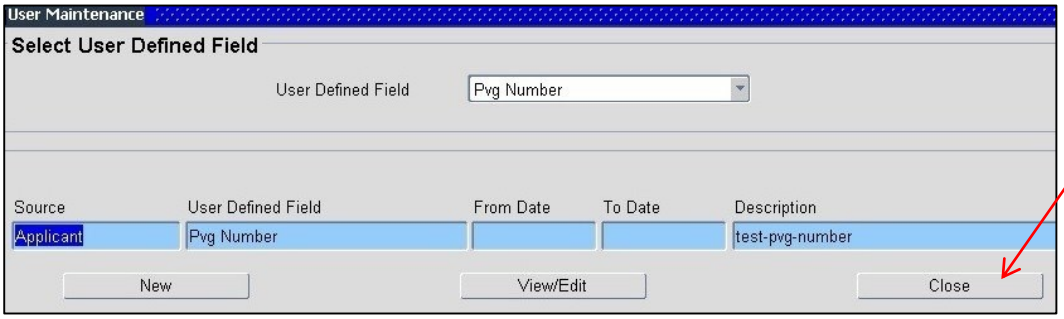
You do not need to enter anything in the **Date From** and **Date To** fields.

Type the PVG number into the **PVG Number** field

click on the **OK** button

Then click **OK** button on the confirmation message





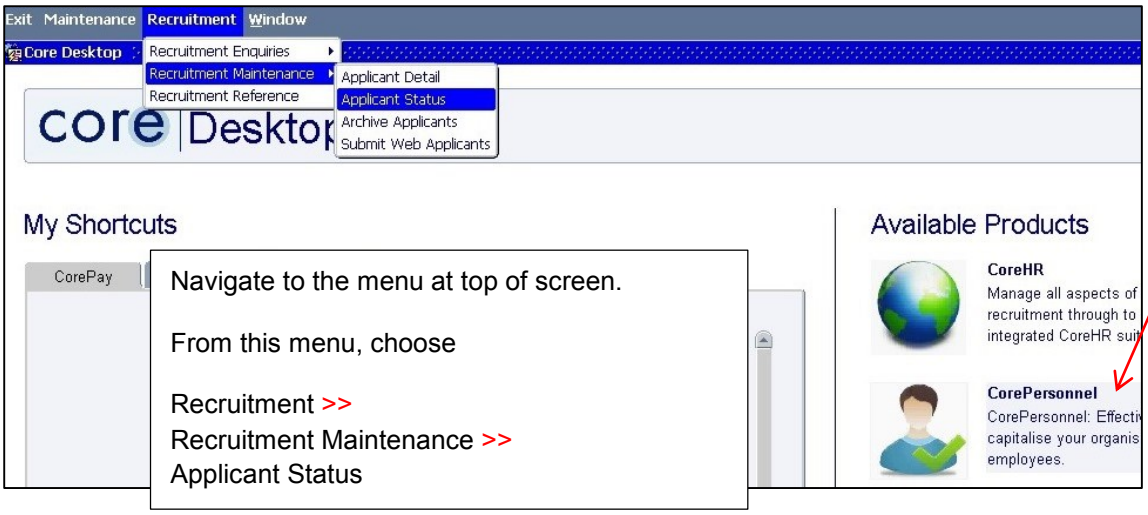
Then click on the **Close** button

How to request references from the system via email

To access the email facility for your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

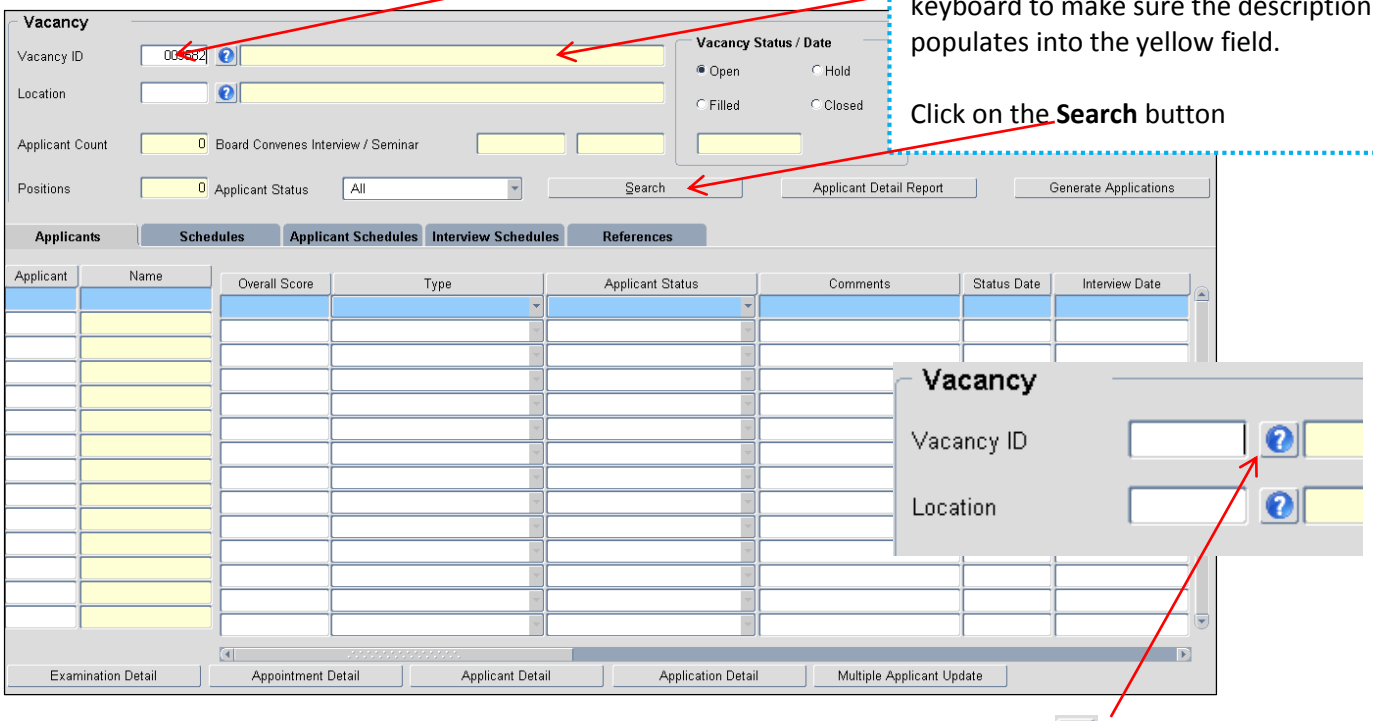
From within the eRecruitment back office, click on Core Personnel



Type your Vacancy number into the **Vacancy ID** field

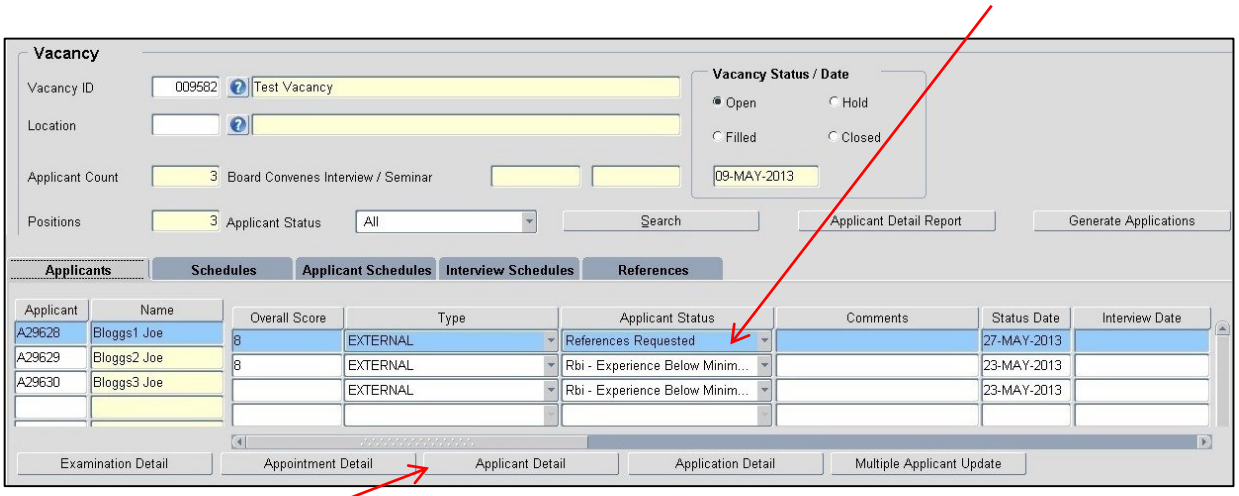
Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button



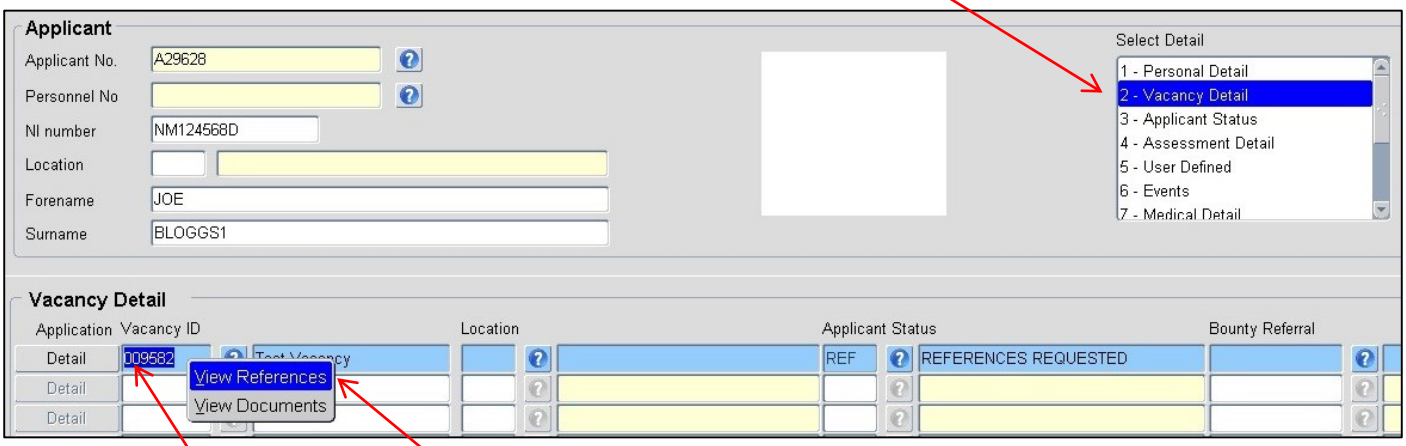
Alternatively, you can also search by the description of your vacancy, by clicking on the button.

Make sure the correct applicant is selected and update the Applicant Status to show **References Requested**.



Click on the **Applicant Detail** button.

From the Select Detail box, click on **2 - Vacancy Detail**.



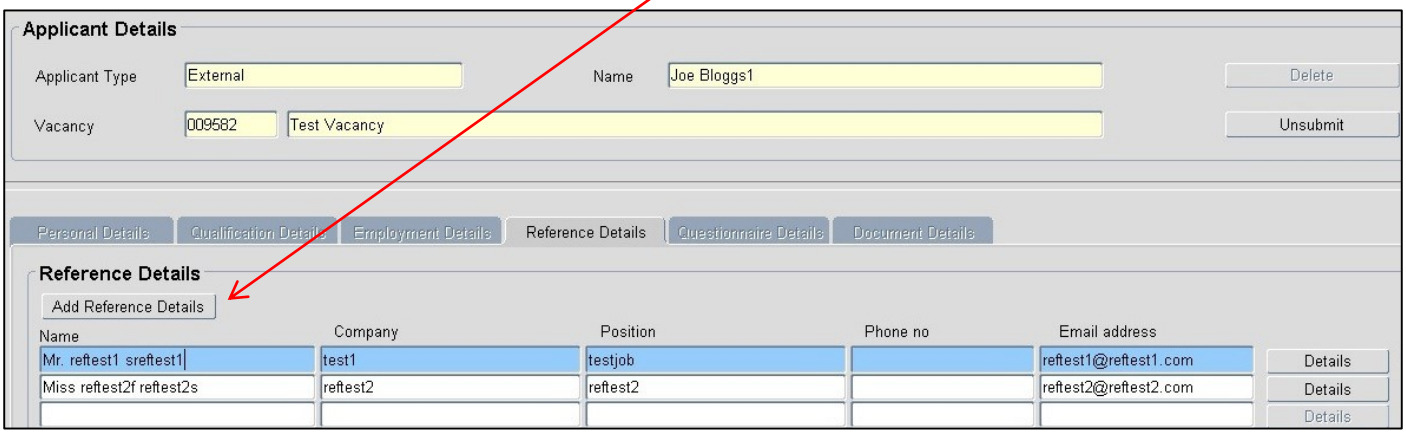
After clicking on **2 - Vacancy Detail**, a list of vacancies for which the candidate has applied to (within your area of responsibility) will display. Find the correct vacancy and click on it.

With the correct vacancy highlighted, right-click within the **Vacancy ID** field

Then select **View References**.

The referees that the applicant has nominated at the time of their application will appear in a list.

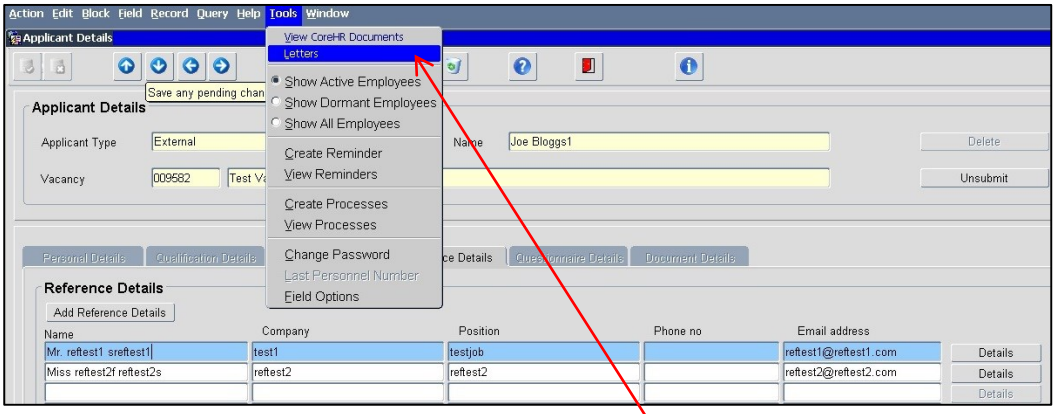
If you want to include another reference, click on the **Add Reference Details** button



NB: If you only want to email one of the referees, then click on the name of the referee.

If you are going to send reference requests to all referees at once, it doesn't matter which referee is highlighted.

Emailing only 1 referee:



Click on the name of the referee, then click on **Tools >> Letters** from the menu at the top of the window.

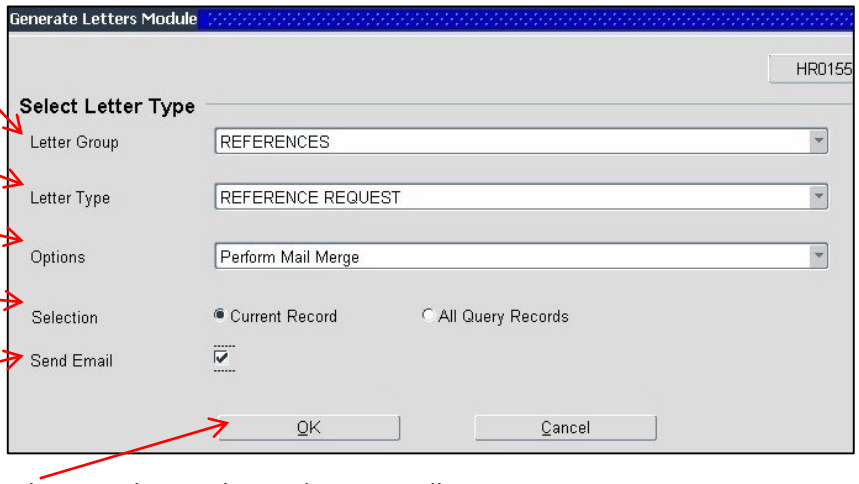
Letter Group - choose References

Letter Type - choose Reference Request

Options - choose Perform Mail Merge

Selection - make sure Current Record is selected

Send Email - make sure box is ticked



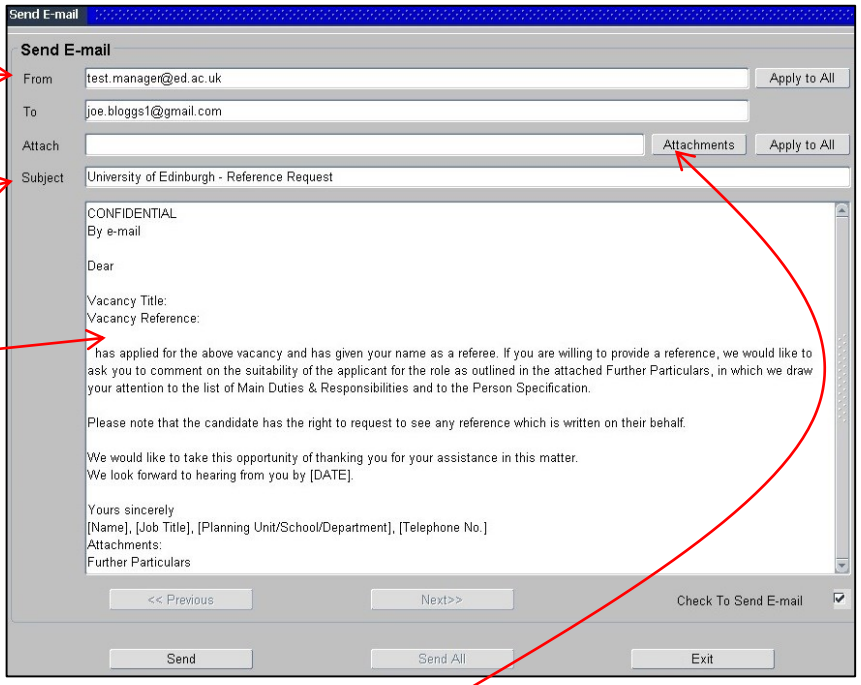
After clicking the **OK** button, the Send E-mail screen will appear.

From: Type your email address, or the email address of another appropriate staff member.

Subject: Edit as required

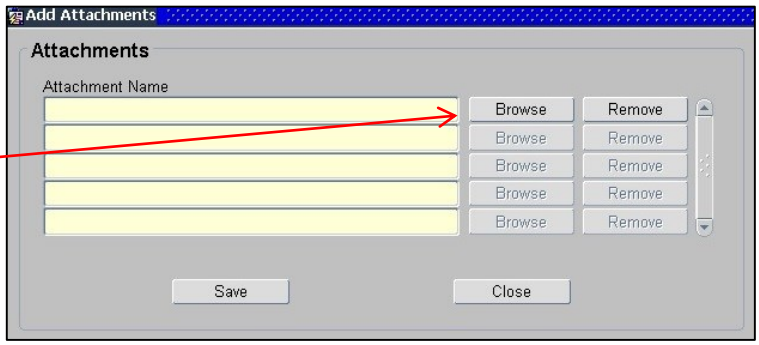
Main Body: Edit as required. Default text is provided and you can change this to suit. You do need to edit the main body and remove any of the [brackets and examples]

NB:
The character limit is 2000



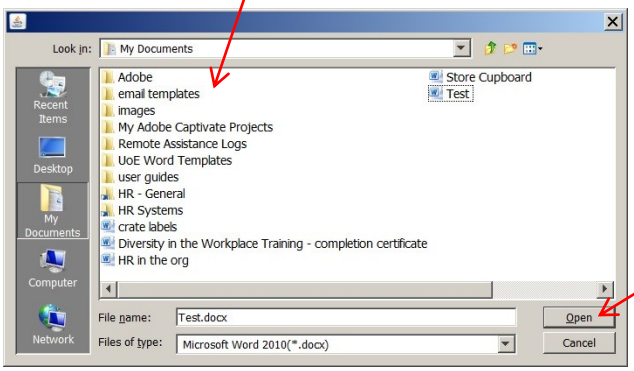
You can attach a document to your email, by clicking on the **Attachments** button.

After you have clicked on the Attachments button, the Add Attachments window will appear.



To attach the document from your computer, click on the **Browse** button.

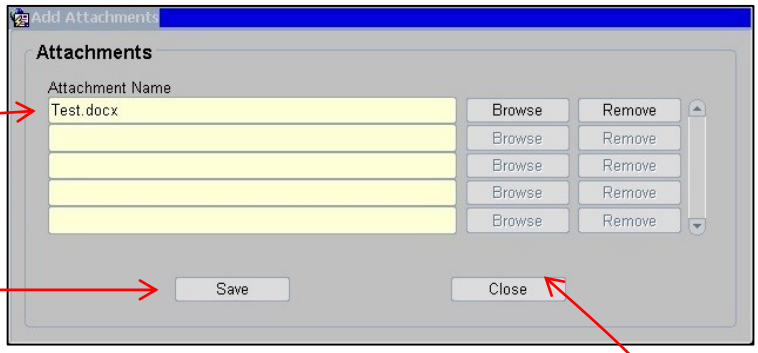
This will open up a window to allow you to select your document. It may open your My Documents folder by default.

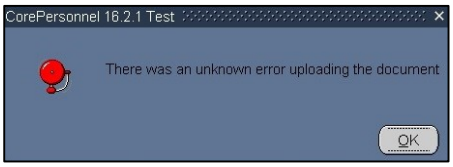


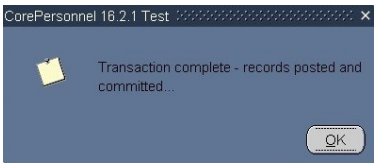
Once you have selected your document, click on the **Open** button

The Add Attachments window will appear again and you can see your document in the yellow **Attachment Name** field

Then click on the **Save** button



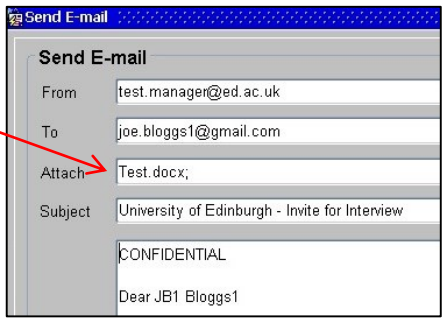




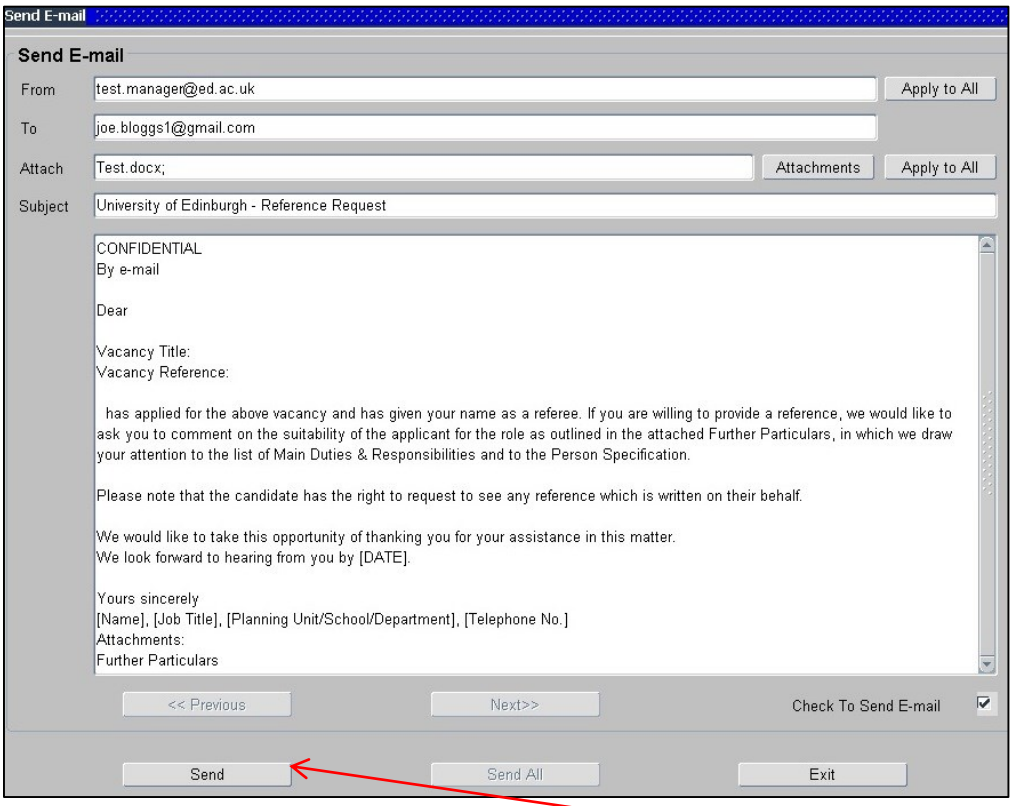
You will then see two message windows.
Click **OK** to both, then click on the **Close** button

You are then returned to your Send E-mail window

You can now see your attachment.



You are not able to remove an attachment from the Send E-mail window. You have to go back into the Add Attachment window and click the Remove button, then the Save button.



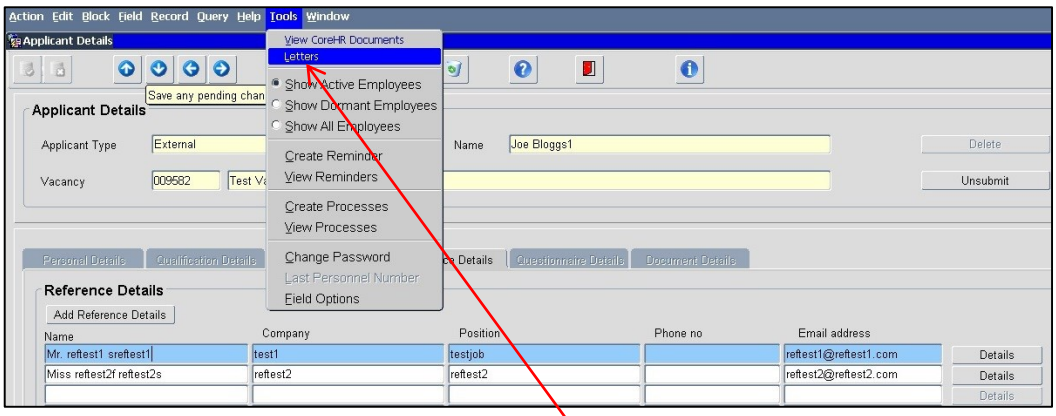
After you have checked that all details within the email are correct, click on the **Send** button.

A confirmation message will appear. Click the OK button.

Emailing all referees:

This procedure will only email a reference request to the referees for 1 applicant.
It is not possible to send reference requests to all referees for all applicants in one procedure.

NB: You will need to send a reference request to all referees for one applicant at a time.



To send a reference request to all the referees at the same time, click on **Tools >> Letters** from the menu at the top of the window.

When emailing many referees simultaneously, the email is tailored to each individual and will not contain details of other referees.

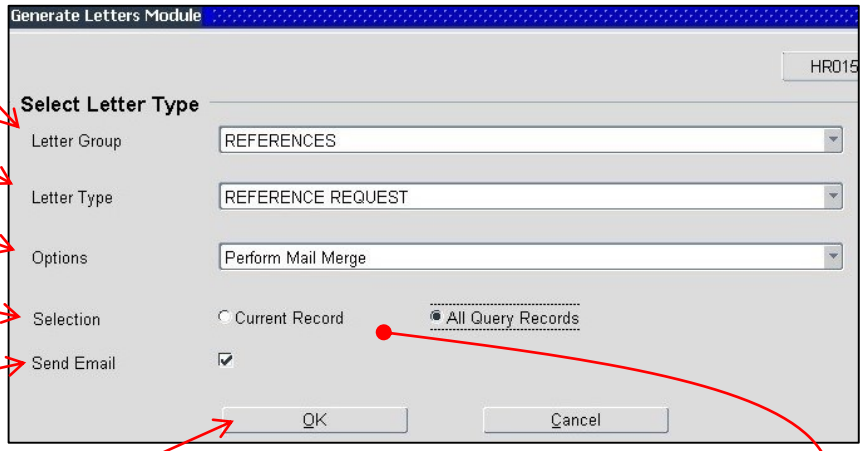
Letter Group - choose References

Letter Type - choose Reference Request.

Options - choose Perform Mail Merge

Selection - make sure All Query Records is selected

Send Email - make sure box is ticked

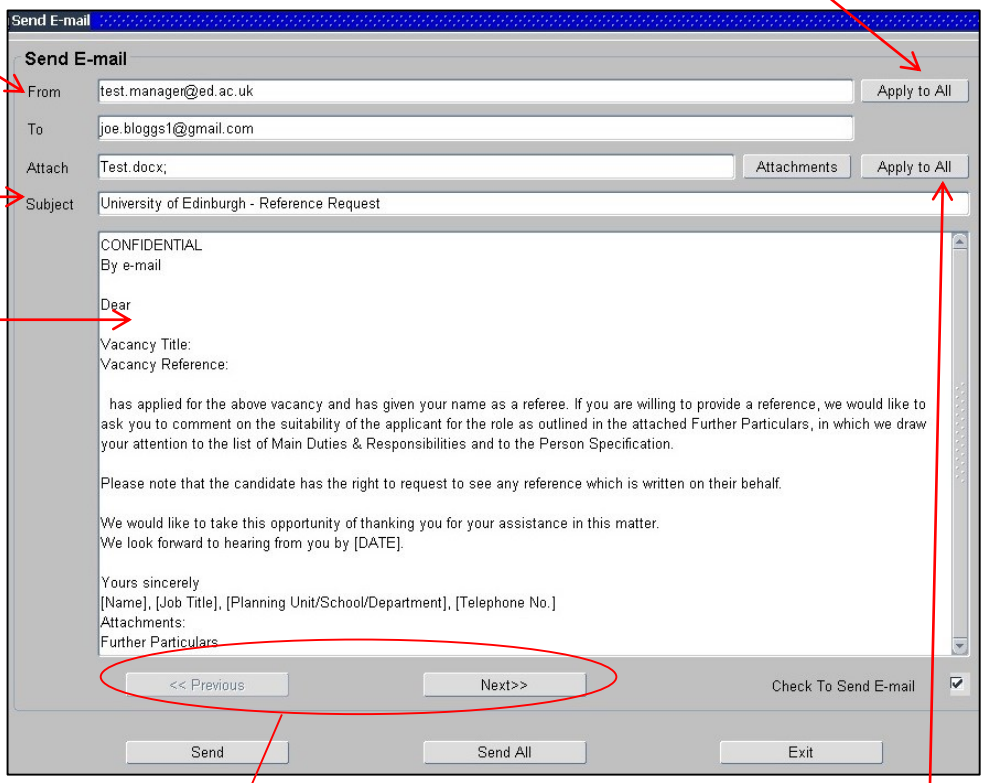


After clicking the **OK** button, the Send E-mail screen will appear.

Within Select Letter Type, the main difference between single emails and group emails is the **Selection** field
When choosing multiple recipients, choose All Query Records

From: Type your email address, or the email address of another appropriate staff member.

You need to also click on the **Apply to All** button to make sure all recipients see this.



Subject: Edit as required

Main Body: Edit as required. Default text is provided and you can change this to suit. You do need to edit the main body and remove any of the [brackets and examples]

NB:
The character limit is 2000

You can attach a document the same way as when you email a single recipient.

However, if you want all recipients to receive the attachment, you need to click on the **Apply to All** button

If you do not want all the recipients to receive the attachment, you would need to individually attach the document to each recipient. You can do this by using the **Next** and **Previous** buttons to scroll between the email recipients.

It is good practice to review each email to make sure the content and other details are correct.

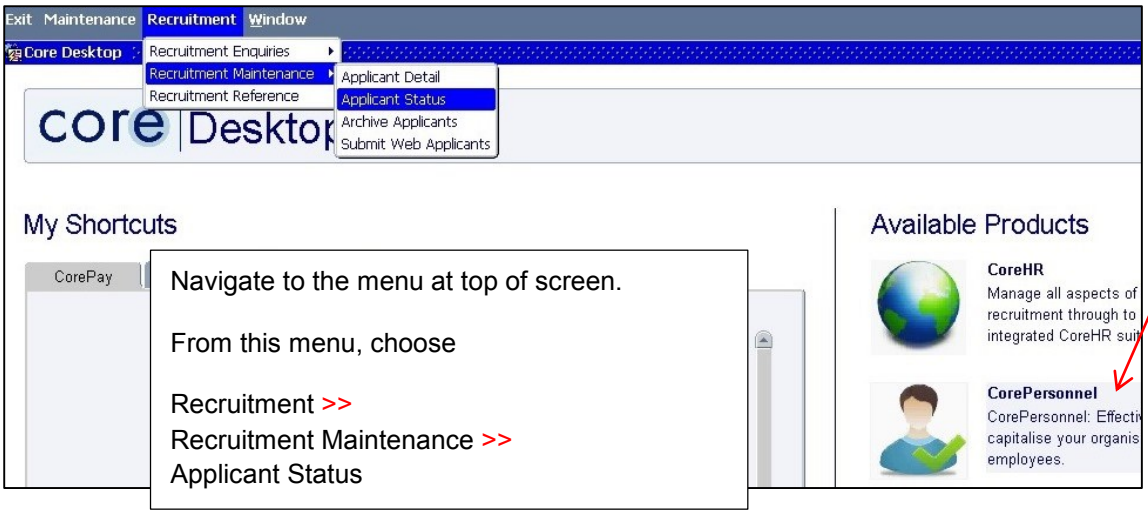
When you are happy with this you can send all the emails at the same time by clicking on the **Send All** button.
If you click on the **Send** button, only the email on your screen will be sent and not the other recipients in the group.

How to view emails sent to applicants via the system

To access the email facility for your vacancy, you need to be in the **Applicant Status** screen, within Back office.

From the Portal, click on Quick Jump, then Core HR
This will take you into eRecruitment back office

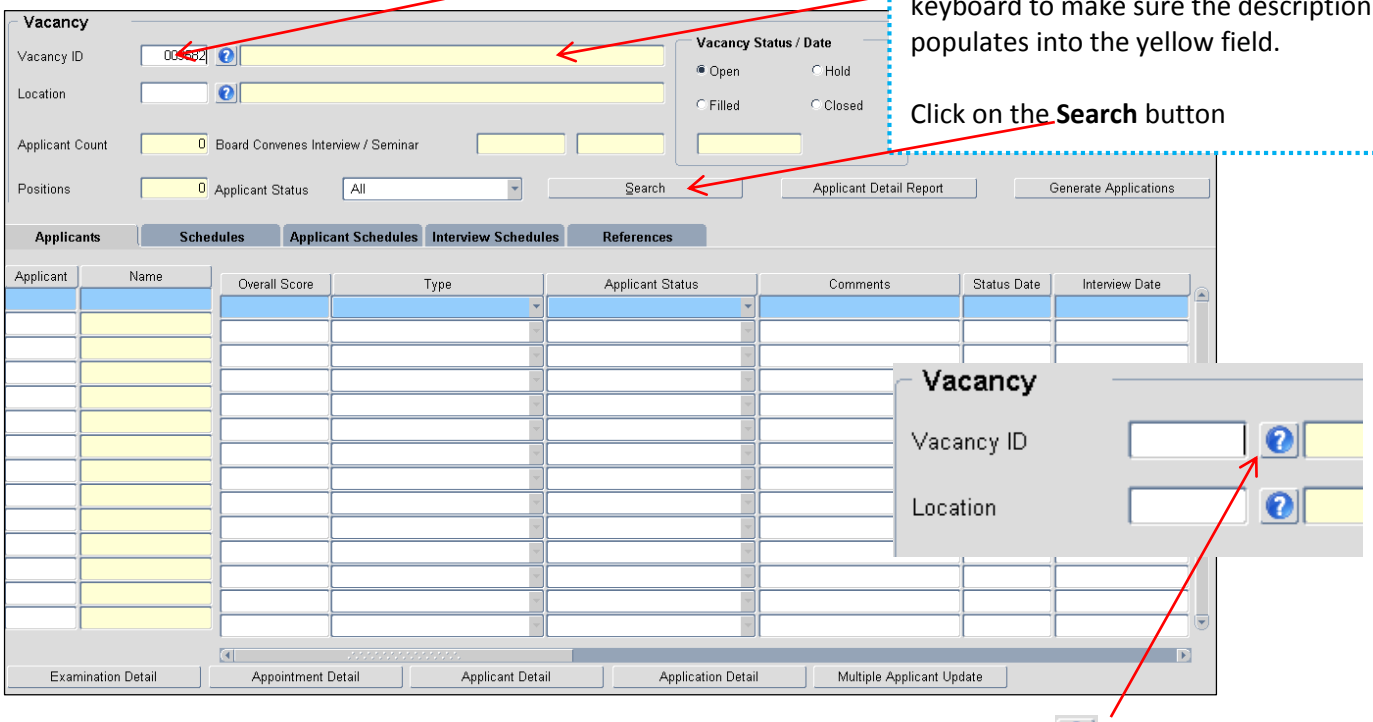
From within the eRecruitment back office, click on Core Personnel



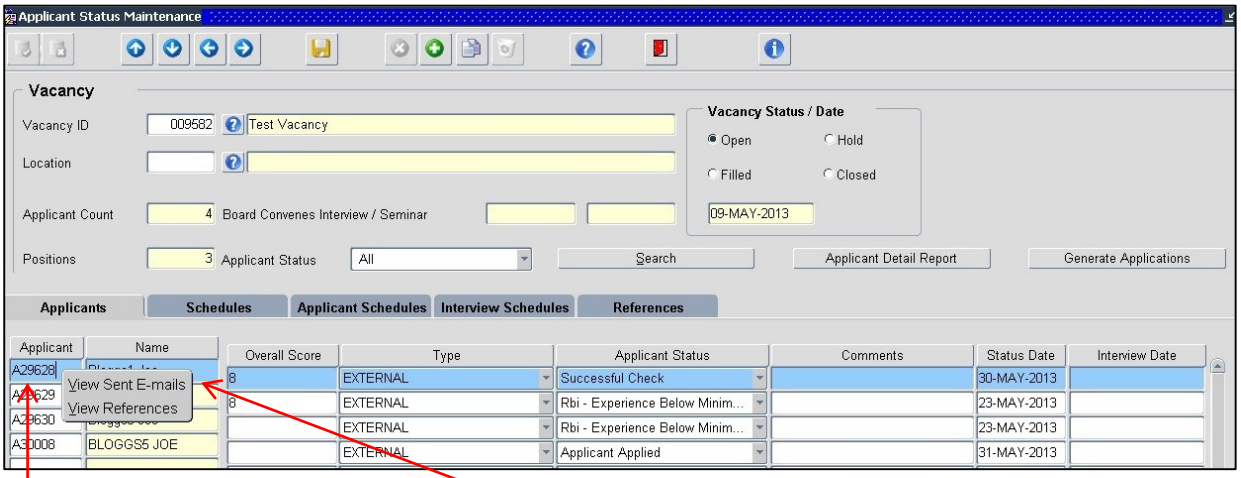
Type your Vacancy number into the **Vacancy ID** field

Press the **Tab** or **Enter** key on your keyboard to make sure the description populates into the yellow field.

Click on the **Search** button



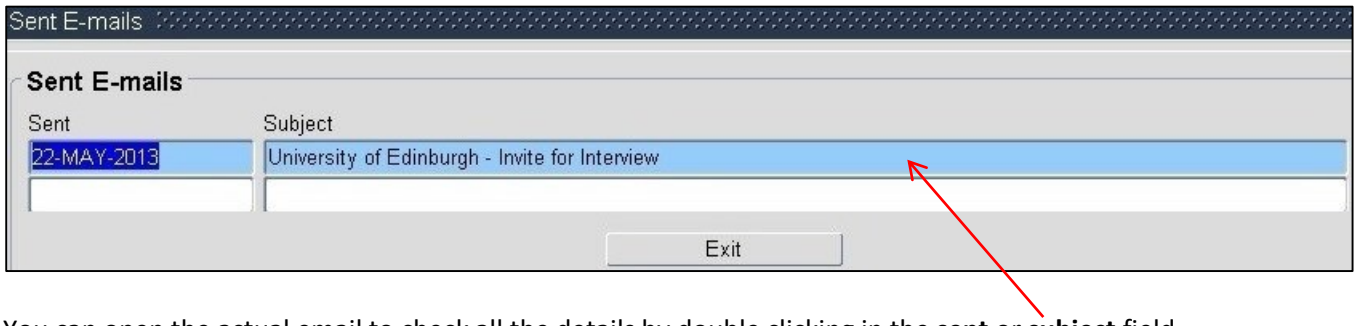
Alternatively, you can also search by the description of your vacancy, by clicking on the button.



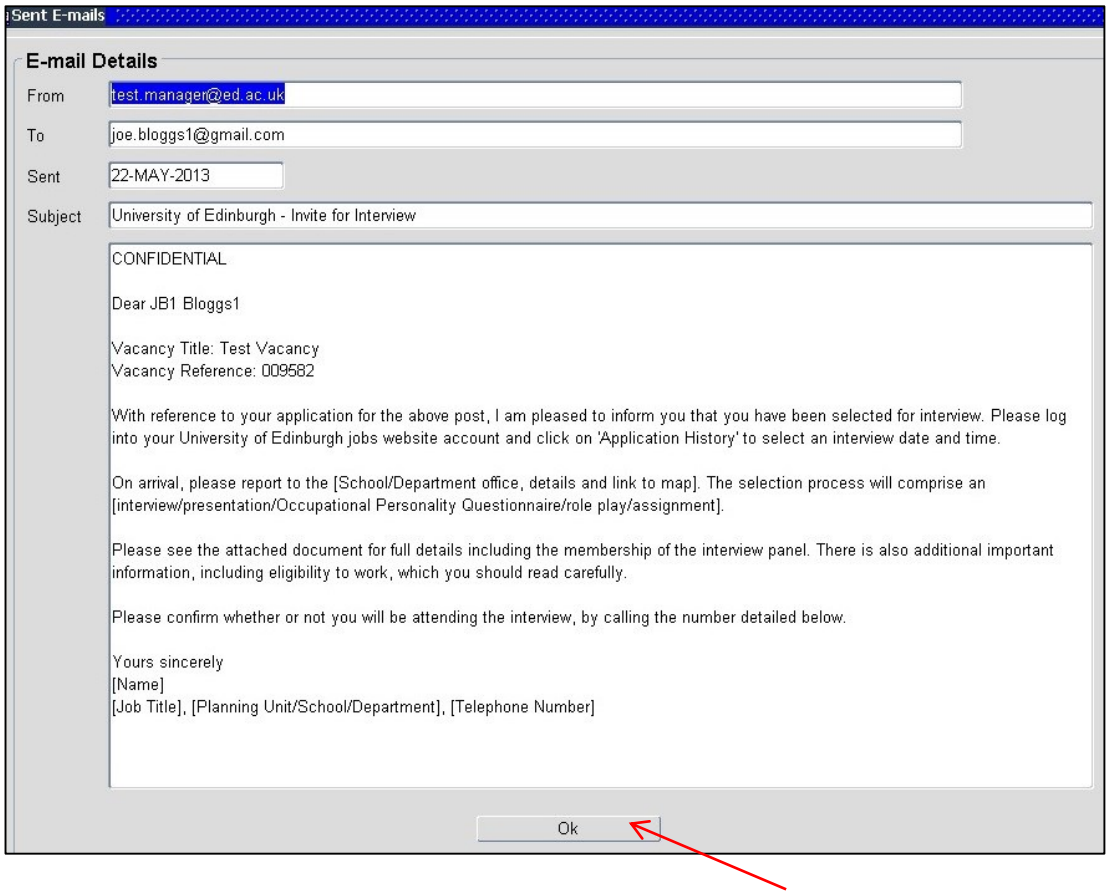
From the list of applicants, click on the right mouse button in the **Applicant No** field.

Then click on **View Sent Emails** from the pop up list

This screen will confirm your email has been sent and it will also give a date stamp. There is no time stamp included in this screen.

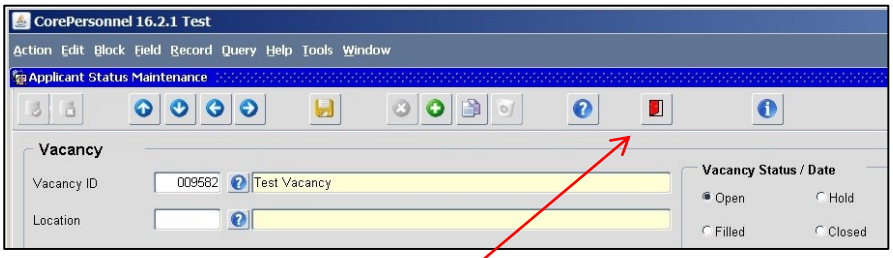


You can open the actual email to check all the details by double clicking in the **sent** or **subject** field.

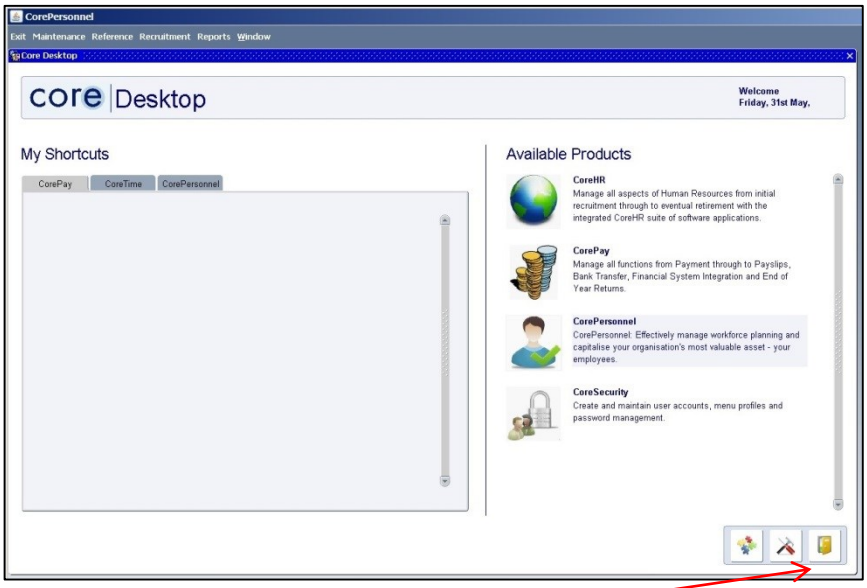


You can now see all the detail on the email to the applicant. To leave this screen, click on **OK**.
Then click the Exit button to take you back to Applicant Status screen

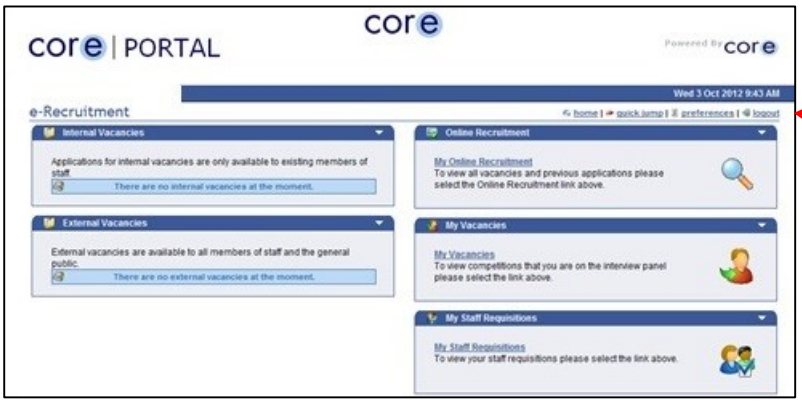
How to exit eRecruitment



The majority of screens have a red door icon which will return you to the previous level you were at. Click the red door until you arrive back to home screen for the back office.



There is a yellow door logo on the back off ice main screen. Click this icon.



Then click on **Logout**